

Ontario. Travel Research Branch
Report No. 41

CA24N
TI 52
-68R41

**a survey of visitors to
MANITOULIN ISLAND
ONTARIO, CANADA
1968**



THE ONTARIO DEPARTMENT OF TOURISM AND INFORMATION

Hon. James Auld, Minister

A. S. Bray, Deputy Minister

REPORT NO. 41

CA20N
T152
68 R41

**A Survey of Visitors
to
MANITOULIN ISLAND**

Peter Klopchic, Ph.D.
Director Travel Research Branch

THE ONTARIO DEPARTMENT OF TOURISM AND INFORMATION

**Parliament Buildings
Toronto, Ontario**

October, 1969

PREFACE

The Ontario Department of Tourism and Information has long been aware of the importance of the tourist industry to residents of Manitoulin Island and its vicinity.

Because of its fine fishing and hunting and other recreational facilities and its proximity to large urban tourist markets, it was also believed that a study of the island, to discover its tourist potential, would be beneficial to the province.


In the Fall of 1967, the Manitoulin-Espanola Regional Tourist Council held a meeting at which it was recommended that a survey of visitors be made. The request was forwarded to the Minister of Tourism and Information.

A questionnaire form and a sampling technique suitable for the project were devised by Travel Research and Development Branch officers during the Spring of 1968, and during the summer, the Survey was done.

Data obtained was analysed by Dr. Peter Klopchic, Director of Travel Research for the Department of Tourism and Information, and the following report was prepared with the assistance of Travel Research Staff.

It is hoped the many factors brought to light will be helpful in the development of this richly endowed tourist area.

A. S. BRAY,
Deputy Minister



Digitized by the Internet Archive
in 2022 with funding from
University of Toronto

<https://archive.org/details/31761115468811>

TABLE OF CONTENTS

Preface	
	<i>Page</i>
Introduction	1
Summary	2
Recommendations	3
Introduction: An Analysis of the Sample of Visitors to Manitoulin Island	4
Characteristics of Respondent-Parties	
Origins of Respondent-Parties; Average Size of Party; Age and Sex Characteristics; Occupation of Party Head; Incidence of Trailer Usage	5
Trip Characteristics	
Type of Transportation; Difficulty in Reaching Manitoulin Island; Total Time Away from Home on Trip; Time Spent in Ontario on the Total Trip; Time Spent on Manitoulin Island	8
Usage of Facilities and Tourist Activity Patterns	
Areas Visited, Facilities Used or Planned to Use on Trip; Respondents' Rating of Tourist Facilities in the Region; Recreation Activities Pursued on Visit to the Region; Points of Interest Visited on or Near Manitoulin Island	11
Expenditure Patterns	17
Motivation of Visits to Manitoulin Island	
Main reason for Travel to the Island; Secondary Reason for Visiting Manitoulin Island; How Manitoulin Island was First Brought to the Attention of Visitors; First Visitation and Repeat Trips to Manitoulin Island	19
Appendices	
I Sampling Procedure	22
II Accommodation on Manitoulin Island	23
III Tables	
Province or State of Origin of Respondent-Parties Visiting Manitoulin Island (I); Home Town of Ontario Respondent-Parties Visiting Manitoulin Island (II); Number of Persons in Respondent-Parties Visiting Manitoulin Island (III); Age Group of Heads of Respondent-Parties Visiting Manitoulin Island (IV); Number of Persons in Respondent-Parties Visiting Manitoulin Island by Category and Age Group, Total — Ferry and Road Samples (V); Composition of Respondent-Parties Visiting Manitoulin Island by Category and Age Group, Total — Ferry and Road Samples (VI); Occupation of Heads of Respondent-Parties Visiting Manitoulin Island (VII); Number of Respondent-Parties Towing a Trailer on Visit to Manitoulin Island (VIII); Main Reasons for Visit to Manitoulin Island (IX); Secondary Reasons for Visit to Manitoulin Island (X); How Manitoulin Island Was Brought to the Attention of Visitors (XI); Respondent's First Trip to Manitoulin Island (XII); Reasons for Re-Visit to Manitoulin Island (XIII); Type of Transportation Used on This Trip to Manitoulin Island (XIV); Difficulty in Getting to Manitoulin Island (XV); Time Away from Home on Visit to Manitoulin Island (XVI); Time Spent in Province of Ontario on This Visit to Manitoulin Island (XVII); Time Spent on Manitoulin Island (XVIII); Areas Visited and Facilities Used by Respondent-Parties on This Trip to Manitoulin Island, Total — Ferry and Road Samples (XIX); Survey on Ferry, Areas Visited and Facilities Used (XIXA); Survey on Road, Areas Visited and Facilities Used (XIXB); Respondent-Parties' Rating of Various Facilities in the Manitoulin Region, Total — Ferry and Road Samples (XX); Recreational Activities Undertaken by Respondent-Parties on Visit to Manitoulin Island (XXI); Points of Interest Visited by Respondent-Parties on Trip to Manitoulin Island (XXII); Approximate Total Expenditures of Respondent-Parties on Manitoulin Island (XXIII); Survey on Ferry, Approximate Expenditure by Categories (XXIVA); Survey on Road, Approximate Expenditure by Categories (XXIVB)	25
IV Manitoulin Island Tourist (Questionnaire) Survey	39
V Map of Manitoulin Island	42

INTRODUCTION

The terrain pattern of Manitoulin Island is extremely attractive for tourism and outdoor recreation and presents some rather unique features to the visitor. The aesthetic appeal of the landscape is further enhanced by various land-use patterns all of which combine to provide a pleasing contrast to the viewer's eyes.

The appealing natural characteristics of the Island's landscape provides the all-essential basic foundation. Approximately 110 miles long and from three to 50 miles wide, the Island is situated in the north-eastern part of Lake Huron in the Georgian Bay. Dotted with over 100 lakes—the three largest of which are Kaga-wong, Mindemoya and Manitou—Manitoulin is reputed to be the largest fresh-water island in the world. Coupled with its abundant lakes, numerous miles of indented shoreline provide an extensive area of land-water contact—a critical requirement for a wide range of popular outdoor recreational activities. The markedly indented configuration of the shoreline together with the presence of off-shore islands endows the area with excellent protected sailing and cruising waters for small boats and ample harbours and anchorages.

Climatic conditions on Manitoulin Island are roughly comparable to those encountered on the Bruce Peninsula and throughout the Georgian Bay region with no particular disadvantages. The mean temperature for July is 68° Fahrenheit which is well within the comfort zone. Hot days are moderated by cool lake breezes which penetrate the entire Island in the evenings. The January mean temperature—between 16° and 18° Fahrenheit—is slightly colder than that of the southern extremity of Georgian Bay.

The Island receives about 100 inches of snowfall with a mean annual precipitation between 28 and 30 inches. There are about 100 rainy days each year.

The inland lakes of Manitoulin Island, its adjacent shoreline-waters and the waters of the North Channel are noted for their angling potential; they form the natural basis for a substantial portion of the tourist industry. In the fall, deer and grouse hunting are favoured by many.

Highway 68, which links directly to Highway 17—the Lake Superior tourist route—is also directly connected to Little Current. A ferry service from Tobermory on the Bruce Peninsula to South Baymouth operates from early May until the end of October. In the height of the summer season (from June 27th to September 1st) two ferries, the S.S. Norisle and the M.S. Norgoma conduct four daily crossings each way. Passenger fares are well within the reach of the average tourist on an extended vacation. The one-way fare for adult passengers is \$3.15; for children between 5 and 12 years of age, the cost of a one-way fare is \$1.45; children under 5 are transported free of charge. The automobile charge is \$6.30. The tariff for trailers depends upon the type and

size and the cost ranges from \$3.45 to \$18.95, the tariff for an average camper trailer being \$6.90.

Several complaints were lodged against the ferry service, reservations in particular. As one respondent noted, "it is not uncommon to have to wait 24 hours or more" for a crossing from Tobermory to South Baymouth.

The fact that the ferries running from Tobermory and South Baymouth are unable to accommodate large tour buses is a disadvantage. Nevertheless, it is possible for these vehicles to enter the Island via Highway 68 at Little Current.

There are seaplane bases on Manitoulin Island situated at Little Current and Manitowaning. In addition, landing strips are located at Gore Bay (an intermediate standard airport with a 6,000-foot runway that could be readily expanded to about 9,000 feet) and Little Current.

In July of this year, 1969, the Georgian Bay Airways of Sudbury started flights into Gore Bay on a regularly scheduled basis for the summer period. Apparently, they hope to make connections with southern Ontario centres at a later date.

From the standpoint of the general market area, Manitoulin Island is reasonably well situated. The heavy urban concentration of the Metro-Horseshoe in southern Ontario can comfortably reach the area within a day's drive. If the traveller follows the Georgian Bay and Lake Superior tourist routes, a long day of driving is involved. Those on an extended landscape tour will take several days to cover the distance. Larger urban centres in the United States—including Detroit, Buffalo and Chicago—are all within a one-to-two-day travel range. Superhighways leading northward through Michigan across the bridge over the Straits of Mackinac to Sault Ste. Marie have improved travelling conditions for American visitors from these larger urban concentrations.

In 1961, the Island's census totalled 11,176 persons. By 1965, the population had declined by 5.6 per cent to 10,554 persons. Tourist and recreation development appears to offer prospects for arresting this decline to a degree.

For some years now, Manitoulin Island has been a focus for tourism and outdoor recreation development. Interestingly enough, a very large portion of this development is focused upon inland lakes with much of the Island's outer shoreline remaining untouched. American ownership has dominated the fairly intensive cottage construction scene, with the majority of the American cottage group originating in Ohio.

Recreational boating and yachting are popular. Little Current, which contains about 100 berths for pleasure craft, is a major organizational point for boating activity in the North Channel and the upper portions of the Georgian Bay. Four other well-developed harbours on the Island have received considerable improvement in recent years.

SUMMARY AND RECOMMENDATIONS

Summary

Manitoulin Island attracts vacationers who are interested in the kind of recreation (largely water-oriented) and relaxation available on the Island. While many spend their entire holiday period on Manitoulin (cottagers especially), the Island is essentially a holding area rather than the final destination for a large number of tourists engaged in a general landscape tour on the Georgian Bay and Lake Superior tourist routes. The car and ferry are the principal modes of transportation to Manitoulin but those travelling to the Island by highway remain for a longer period of time than those who travel by ferry and tend to make Manitoulin their final destination.

Of the average time spent away from home (10.2 days) associated with a trip made to Manitoulin Island, respondents in the combined road and ferry samples spent an average length of stay of 8.4 days in the Province of Ontario.

The market area in terms of major political units in Canada and the United States was Ontario, Michigan and Ohio, the combined areas of which provided 85.4 per cent of all visitors to the Island. Advertising and promotion should therefore be concentrated in these areas.

Dominant in the market pattern was Ontario; 62.2 per cent of all visitors to Manitoulin lived in this province. The determining factor was distance which either drew or "turned away" residents of major urban centres and regions in Ontario.

Owing to its proximity and excellent accessibility to Manitoulin Island, the State of Illinois would appear to be a potential, major market area. A careful marketing analysis of this State should be made in order to discover the best means of attracting Illinois tourists to the Island.

The average party size of the combined road and ferry samples was 3.39 persons—composed essentially of family couples travelling with children 12 years of age or under—who spent an average of 3.9 days on the Island. The average age of the respondent party-head was 41.5 years. Adult parties accounted for 70.9 per cent of all visitors. No occupational grouping appeared to be overwhelmingly dominant. The Island seems, therefore, to appeal to people from various backgrounds, education and income levels.

The average expenditure on the Island per respondent-party of the combined samples was \$105.83. Because respondent-parties included in the road sample stayed for a longer period of time, their average expenditure was double those in the ferry sample.

Tourist, recreation and general leisure time travel was the primary motivation for visiting Manitoulin. The majority of respondents gave no secondary reasons for their travel pattern.

Contacts with friends and relatives and "word-of-mouth" were said to have created an awareness of the Island in 61.6 per cent of the respondents.

The Island satisfied visitor requirements and expectations sufficiently to engender a desire for re-visitation in the pursuit of a similar holiday. Of the respondents, 52.4 per cent were repeat visitors while 45.4 per cent were making their first visit to Manitoulin. Locational factors seem to suggest that the present pattern may be the norm which will continue to persist for some time.

There is a suggestion, however, that the Island may not be building a substantial base for repeat visitation. This may be due to an unsatisfactory impact upon the first-time visitor or the comparatively slow growth in vested property interests of the type that draw people back to the Island each year.

On their trip to and including Manitoulin Island, the 834 respondent-parties utilized a total of 4,222 facilities or an average of 5.1 facilities per respondent-party. Outdoor recreational activities dominated the pattern accounting for 80.8 per cent of the types designated of which a significant 66.5 per cent were fundamentally water-based. Due to their longer length of stay, respondent-parties in the road sample engaged in 2.0 times as many activities as those in the ferry sample.

It would be automatically expected that all parties engaged on a landscape tour of an area the size of Manitoulin Island would have visited an average of at least one cultural or commercial attraction during a holiday of the length indicated. Conversely, 65.2 per cent of the respondents did not indicate that they had visited any attractions either on the Island or on the adjacent mainland to the north.

The general impression conveyed by the respondents' rating of the Island's facilities is simply that there is not enough to do; places "close up" and activity "dies away" too early to suit many of the Island's tourists. Major improvements are obviously necessary to rectify this situation. A large number of respondents gave the Island's local price structure a less than satisfactory rating. However, the friendliness of local residents created a favourable impression which is important to the welfare of the tourist industry.

Recommendations

1. Because of its outstanding geographical features and its proximity, in both travel time and mileage, to numerous urban markets, the Island of Manitoulin has potential for the development of a provincial park. However, it must be emphasized that NOW is propitious time to act. Within 20 to 30 years, a proposed expressway stretching from the Kitchener-Galt-Hamilton industrial complex to the Bruce Peninsula may become a reality. As a consequence, a substantial increase in the demand for outdoor recreation on the Island could accompany the construction of this arterial highway. If the provincial government delays in its action, suitable natural resources required for a future park may be impaired and land acquisition costs may prove to be either needlessly expensive, or involve disturbing expropriation procedures.
2. Local Tourist Councils and/or Chambers of Commerce should provide leadership in a program to maximize the advantages of the tourist industry associated with the presence of an island airport. Chartered air flights could be arranged to and from major American cities, such as Chicago and Pittsburgh. For visitors to the Island travelling by air, flights could be integrated with a developed scheme—a type of “package deal” which would include, along with accommodation, such tourist facilities as golfing and fishing on its agenda. In the summer, “package deal” trips could be specially arranged for family groups. In the fall, the market could be focused upon hunters.
3. Respondents’ ratings of various facilities have indicated that improvements in specific features are necessary to meet standards demanded by tourists. Entertainment facilities, which appear to be particularly weak, should be studied to discover how those in existence could be improved or new features introduced. Dances, jamborees, sports events and other activities might be organized to ensure a plentiful and varied timetable for visitors of all ages.
4. The importance of the tourist industry to the present and future economy of the Island should be repeatedly stressed to the entire community. All residents of the Island should be encouraged to play their part to ensure that the general atmosphere of the Island and its tourist accommodation, historic and educational features, restaurants and other visitor facilities are kept as attractive as possible. Special attention should be given to the modernization of tourist establishments with an attempt made to provide all rental units with bath facilities, or at least showers.
5. Promotion of the Island’s activities should be directed first to the Ontario audience and then to the American states of Michigan, Ohio and Illinois, initiating an extensive advertising campaign in Chicago and its environs. There should be no difficulty in producing many new visitors from these potential sources.
6. In considering the geographic configurations of Manitoulin Island, it would appear that there is a possibility for the development of snowmobile trails and facilities in the area, creating a winter tourist season. The market would have to be studied closely especially as regards the competition from areas closer to urban centres.
7. The production and merchandising of Indian handicrafts requires further development. The Indian arts and handicrafts of Manitoulin are attractive as tourist souvenirs and their production seems to mesh with the Indian cultural heritage. Benefits would accrue to both the tourist trade and the livelihood of those living on reservations located on the Island.
8. The further improvement of the Island’s harbours and boating facilities is an urgent necessity. Up-to-date navigational aids and improved charts for pleasure craft are also required.
9. It would be desirable and beneficial in the long run, if the Island’s gravel roads to primary recreational resource areas were asphalt-surfaced for more pleasurable trips by tourists and other travellers.
10. Throughout the report, differences between the road and ferry samples accumulated. Although the ferry does save some mileage, in only a limited number of cases does it save time. As noted, delays in the busy part of the season can be quite serious. Those persons for whom the ferry does save time and mileage often leave their cars in Tobermory and arrange to be picked up upon their crossing. Repeat visitors or those persons with definite deadlines (such as renting a cottage on a Saturday) seldom use the ferry. Thus, in general, the ferry is considered to be more or less of a novelty to those without any definite plans. Nevertheless, guaranteed reservations should be enforced to prevent serious delays in the travel time of the Island’s visitors.
11. There are numerous scenic lookouts on the Island, none of which has been satisfactorily developed. The Cup-and-Saucer Lookout represents a Class I scenic resource for which considerable improvement is necessary and justified. An interpretation program at the peak is essential.

INTRODUCTION

An Analysis of the Sample of Visitors to Manitoulin Island

The salient features resulting from an analysis of the responses to the questionnaire obtained in the road and ferry samples are summarized in this section of the report. The diverse body of facts assembled have been grouped into several major homogeneous topics.

Visitor-party characteristics are examined. The motivation for the visit is then considered. Trip characteristics involving such aspects as type of transportation are reviewed. Tourist activity patterns and their rating of particular facilities and services then receive attention. Finally, the expenditure patterns are summarized.

CHARACTERISTICS OF RESPONDENT-PARTIES

Sections of the questionnaire were related to visitor-party characteristics. Subsequently, the origins of visitors to Manitoulin Island were determined from an analysis of the combined samples. Aspects such as the size and composition of parties, the age and occupation of respondent party-heads and other relevant factors are discussed.

Origins of Respondent-Parties¹

In the combined road and ferry samples, Canada was the domicile of 65.9 per cent of the respondent-parties while 34.1 per cent resided in the United States. The American market was, therefore, of real significance in the tourist and recreation visitor pattern for Manitoulin Island.

Place of Residence	Per Cent
A. Canada	
Ontario	62.2%
Quebec	1.1
Other Provinces	2.6
Sub-Total—Canada	65.9%
B. U.S.A.	
Michigan	12.4%
New York	1.8
Ohio	10.8
Pennsylvania	1.4
Other States	7.7
Sub-Total—U.S.A.	34.1%
TOTAL	100.0%

Dominant in the market pattern was Ontario; 62.2 per cent of all visitors to Manitoulin lived in this province. Or, in other words, 94.4 per cent of those visitors residing in Canada had their place of origin in Ontario. Residents of other Canadian provinces had no substantial impact.

The market area in terms of major political units in Canada and the United States was Ontario, Michigan and Ohio—the combined areas of which provided 85.4 per cent of all visitors to Manitoulin. Advertising and promotion should thus be concentrated in these areas.

Despite its proximity and excellent accessibility to Manitoulin Island, the State of Illinois generated surprisingly few visitors. The city of Chicago, with a population of approximately eight million and a gross value of production equivalent to the national product of all Canada, generated less than one per cent of all respondent-parties. What potentially appears to be a major market area fails to be actualized. A careful

marketing analysis of this State should be made in order to discover the best means of attracting Illinois tourists to the Island. Of those respondents who indicated that they were residents of the province of Ontario, 48.3 per cent resided in the nine cities listed in the following table; another 50.9 per cent had their residence in various other locations throughout the province.

Three specifically designated cities in the Golden Horseshoe Region stretching from Niagara Falls to Oshawa proved to be the permanent place of residence for 29.6 per cent of all respondents. Respondents from these centres formed 34.5 per cent of the road sample and 27.8 per cent of the sample taken on the ferry. In 1966, these urban areas contained approximately one-fifth of the total population for Ontario.

A. Major Urban Centres and Regions

1. In the Golden Horseshoe Region	
Toronto	23.1%
Hamilton	6.2
Niagara Falls	0.3
Sub-total 1.	29.6%
2. In the Western Region	
London	3.8%
Kitchener	4.0
Windsor	2.7
Sub-total 2.	10.5%
3. In the Eastern Region	
Kingston	0.8%
Ottawa	1.2
Sub-total 3.	2.0%
4. In the Central Region	
Sudbury	6.2%
Total A.	48.3%
B. Other Ontario Locations	50.9
C. Did Not State	0.8
GRAND TOTAL	100.0%

London, Kitchener and Windsor in the Western Region was the permanent residence of 10.5 per cent of the respondents. This group was more strongly represented on the ferry where 11.5 per cent indicated residence in these cities as opposed to 8.3 per cent in the road sample. Approximately 7 per cent of the population of Ontario lived in these cities in 1966.

¹See Appendix Tables I and II for greater detailed information relating to the places of origins.

Distance obviously exerted an adverse effect for residents of Kingston and Ottawa in the Eastern Region; only 2.0 per cent of the respondents originated from these centres forming 2.1 per cent of the ferry sample and 1.4 per cent of the road sample. About 5 per cent of the total population of Ontario resided in Kingston and Ottawa in 1966.

Sudbury in the Central Region was the place of residence for 6.2 per cent of the respondent-parties. This city contained only 1.2 per cent of the province's population in 1966. Its close proximity to Manitoulin Island (in comparison to other major urban centres previously noted) is obviously the major factor involved in this case. Interestingly, 5.4 per cent of the respondents in the ferry sample and 8.3 per cent of those on the road had their place of residence in Sudbury. Although a greater difference might have been expected, the modest difference that did occur would seem to suggest that residents of Sudbury visit Manitoulin Island on a general landscape and holiday tour and depart, via the ferry, for other parts of the Province.

Average Size of Party¹

The average party size in the sample of visitors transported by ferry was 3.28 persons; an average party size of 3.67 persons travelled on the roads. The combination of the results of both samples produced an average of 3.39 persons. Variations were not of sufficient magnitude to be of any significance.

The foregoing averages proved to be similar to those found in recent studies conducted by the Travel Research Branch of the Ontario Department of Tourism and Information.

Previous Travel Research Branch Studies	Average Number of Persons Per Trip
Travel Habits of Metro-Toronto Households, 1964-1965	Non-business trip 3.5 Business trip 1.6
Travel Habits of Ontario Households, 1966-1967	Vacation trip 3.5 Personal trip 3.4 Business trip 2.1
Stratford Visitor Survey (Visitors to Stratford Festival Theatre) 1967 2.9
A Survey of Visitors to the Shaw Festival Theatre, Niagara-on-the-Lake, 1968 3.4

From an analysis of the combined samples, it was found that a party composed of two persons was most frequent forming 36.8 per cent of all visitor-parties. Party groupings of four ranked second constituting 22.9 per cent. Parties with two to five individuals accounted for 86 per cent of all visitor-groups.

Parties of one individual were comparatively unimportant representing only 4.2 per cent of the total; those composed of six or more individuals formed 8.8 per cent.

Age and Sex Characteristics¹

The average age of respondent party-heads in the sample obtained on the ferry was 41 years; the average age of respondent party-heads in the road sample was 43 years. Combining the results of both samples revealed an average age of 41.5 years. Again the minute differences involved here are not significant to tourism and recreational planning.

Respondent Party-Heads Age Group Years	Per Cent Combined Samples
Under 20	1.4%
21 - 34	29.5
35 - 49	37.9
50 and over	29.0
Did Not State	2.2
Total	100.0%

Just over 67 per cent of all party heads were between 20 and 49 years of age. Most people in this age group are physically capable and mentally adjusted for the pursuit of a wide range of tourist and recreation activities.

Another 29 per cent were 50 years of age and over. While still physically capable of pursuing most activities, a large proportion of the people in this age group seek a more leisurely and passive quality to their tourist and recreation past-times.

The 834 respondent-parties in the combined road and ferry samples contained a total of 2,790 individuals. The distribution of the total volume of visitors by general age and sex groupings is shown in the following table.

Category	Number	Per Cent	Average Per Party
Adult Men (18 years or more)	1,029	36.9%	1.23
Adult Women (18 years or more)	950	34.0	1.14
Teenagers (13-17 years)	226	8.1	0.27
Children (12 years or less)	585	21.0	0.70
Total	2,790	100.0%	3.35 ¹

¹The difference between the 3.35 and the 3.39 previously derived for average party size is due to rounding of percentages.

Adults 18 years or more totalled 1,979. They represented 70.9 per cent of all visitors and averaged 2.37 persons per party.

¹For greater detail, see Appendix Table III.

¹For greater detail, see Appendix Tables IV, V and VI.

Children 12 years of age or under accounted for 21.0 per cent of the total number of tourists. There were 585 individuals in this group or an average of 0.70 persons per party. Teenagers were poorly represented constituting only 8.1 per cent of the tourists. This group totalled 226 for an average of 0.27 persons per party.

Combining the foregoing pattern with the previous insight gained from the distribution of parties by size, the following composition of respondent-parties visiting Manitoulin Island may be assumed. According to Table III, parties of two represented 36.8 per cent of all respondents. Apparently combinations were family couples rather than two people of the same sex. Another 49.2 per cent of all parties contained between three to five individuals. It could be presumed that these were family groupings composed of two adults travelling with children 12 years of age or under who dominated the ratio by about three to one over teenagers.

Occupation of Party Head¹

There was a reasonably close conformity in the occupational pattern of the party head revealed in both the road and ferry samples. In the subsequent discussion, the results of both samples are combined.

Occupational Grouping	Per Cent Respondent Party-Heads
Professional	20.5%
Owner/Managerial/Farmer ..	16.9
Skilled/Unskilled Labour ...	26.5
Office/Sales	15.6
Retired	6.3
Public Service	1.8
Student	0.7
Other	5.8
Did Not State	5.9
Total	100.0%

The strong representation of all four major occupational groupings including professional, owner/managerial/farmer, skilled/unskilled labour and office/sales is a noticeable feature of the foregoing table. No one group is overwhelmingly dominant. Manitoulin Island seems, therefore, to appeal to people from various backgrounds, education and income levels.

Of the respondents, 26.5 per cent indicated that they were employed in labouring occupational categories. Of this group, 24.9 per cent were classed as skilled labourers; 1.6 per cent were classed as unskilled labourers. The cost of a holiday on the Island appears to be attractive to and well within the price range of these labour occupational groupings.

Professional groups (including teachers, clerics and others) accounted for 20.5 per cent of all respondents. This generally higher income group is almost identically represented in both the road and ferry samples.

The owner and managerial occupational groups, together with farmers and market gardeners who constituted about 3.4 per cent of this group, formed another 16.9 per cent of the visitors. The commercial business segment was the key factor constituting 13.5 per cent.

Respondents with various office and sales occupations ranked fourth with 15.6 per cent falling in this category.

Retired people formed 6.3 per cent of the respondents; those in public service occupations totalled 1.8 per cent.

Students as party heads were poorly represented forming only 0.7 per cent of the total.

Incidence of Trailer Usage¹

An analysis of the combined ferry and road samples revealed that 15.9 per cent of the parties hauled camping and boat trailers or mobile homes. Of these, 53.4 per cent had camping trailers and 8.3 per cent had mobile homes. Another 29.3 per cent towed boat trailers and 9 per cent hauled other types.

There were some interesting differences between the ferry and road samples in this instance, the principal cause being, in all probability, the price of transporting trailers on the ferry.

Only 11.4 per cent of the respondents were hauling trailers in the ferry sample compared with 27.1 per cent in the road sample. About 69.1 per cent of the trailers in the ferry sample were either campers or mobile homes while only 53.8 per cent fell into this category in the road sample. In the ferry sample, 20.6 per cent of the trailers were for boats while 38.5 per cent were of this type in the road investigation. This suggests that visitors consider the cost of transporting mobile accommodation on the ferry more worthwhile than boat trailers. On the other hand, it may simply reflect the fact that more visitors in this general vacation region preferred to haul their own accommodation.

¹For greater detail, see Appendix Table VII.

¹For greater detail, see Appendix Table VIII.

TRIP CHARACTERISTICS

Attention is now focused upon some of the more prominent trip characteristics revealed from an analysis of the samples. Included are such factors as travel time, type of transportation and communities visited or passed through.

Type of Transportation¹

The principal mode of transportation to the Island was the passenger car and station wagon. In the combined ferry and road samples, 95.6 per cent of all respondent-parties used these forms of conveyance. There was an extremely close correspondence between the samples in this respect.

Since the bulk of those persons visiting the Island by private or chartered aircraft and pleasure boats would not to be tabulated in the sampling procedure, the study provides no measure of visitation by these modes of transportation.

Mode of Transportation	Per Cent Combined Sample
Private car and station wagon	95.6%
Commercial:	
Bus	0.1
Train	—
Plane	0.1
Other	2.2
Sub-total	2.4%
Did Not State	2.0
TOTAL	100.0%

The poor condition of many of the roads on the Island is undoubtedly a factor which accounts for the absence of tourist visitation by bus. Moreover, the ferry cannot

accommodate the large touring bus. Bus tours moving through northern Ontario along the Lake Superior Route may be reluctant to make a 32-mile diversion from McKerrow to Little Current along a route that must be retraversed to leave the Island. The fact that a circular tour of Manitoulin Island over paved roads is not possible exerts a further inhibiting effect. Finally, there are no available large-scale accommodation establishments that could handle bus tours at the height of the tourist season.

Difficulty in Reaching Manitoulin Island¹

Only 6.9 per cent of the respondents indicated that they experienced some difficulty in getting to the Island. A majority of the respondents (81.8 per cent) encountered no problem while another 11.3 per cent did not answer this question.

Some interesting variations between the road and ferry samples emerged in this instance. Surprisingly, only 5.9 per cent of the respondents in the ferry sample indicated difficulties as compared with 9.6 per cent in the road investigation. It might have been expected that the opposite pattern would have been displayed.

When a ferry crossing is involved, difficulties in obtaining passage are frequently experienced at the height of the tourist season and a percentage of the travellers always find schedules inconvenient. The highway route is fairly direct and as well marked as any in the province. Some respondents in the road sample may, however, have recorded difficulties when what they actually meant was that the trip was long or arduous particularly if they were travelling with a large family.

It should be further noted that 15.2 per cent of the respondents in the ferry sample did not answer this question compared with only 1.7 per cent in the road survey.

¹For greater detail, see Appendix Table XIV.

¹For greater detail, see Appendix Table XV.

Total Time Away From Home on Trip¹

Trip Type and Duration	Ferry Sample Per Cent	Road Sample Per Cent	Combined Sample Per Cent
1. Day Trippers — ½-1 day	1.7%	1.7%	1.7%
2. Weekend Trippers — 2-3 days	10.9	9.6	10.5
3. Vacation Trippers:			
Potential two weeks — 4-14 days...	71.9	65.0	69.9
Potential three weeks — 15-21 days	9.4	9.6	9.5
Potential four weeks — 22-30 days	3.0	4.1	3.4
Potential summer — over 30 days..	1.9	10.0	4.2
Sub-total 3	86.2%	88.7%	87.0%
4. Did Not State	1.2	—	0.8
Total	100.0%	100.0%	100.0%

¹For greater detail, see Appendix Table XVI.

From an analysis of responses to the combined road and ferry samples, it was found that the average planned length of time away from home for the entire trip was 10.2 days. The corresponding value for the ferry sample was 9.4 days and that for the road investigation 11.9 days. In effect, the trip length for respondents in the road sample was 1.27 times that of the ferry.

Vacation trippers with four or more days away from home dominated the pattern of both the road and ferry samples and differences between the two were minimal. The potential two-week vacation trippers, represented by those away from home for four to 14 days was the mode. This group constituted 69.9 per cent of the combined sample and rose as high as 71.9 per cent in the ferry investigation. Parties on a potential three-week vacation were also prominent amounting to 9.5 per cent in the combined sample. They proved almost as important as the two-to-three-day weekend trippers. The more extended vacation of four weeks or more included only 7.6 per cent of the respondents and differences between the road and ferry samples were insignificant.

Weekend trips were characteristic of 10.5 per cent of those responding to the combined sample. The percentage difference of 1.3 between the road and ferry investigations is again unimportant. For those living in communities along the north mainland shore and in centres as far distant as Sudbury or those residing close to the Tobermory ferry terminal, a weekend trip permits up to two full days on the Island. For those living at a greater distance, a visit of this duration probably involves little more than a drive through the Island with an overnight stop. Obviously, much of the time would be spent on travel to and from the place of residence.

Only 1.7 per cent of the respondent-visitors were involved in day or half-day trips. Such a trip is feasible only for those living on the north shore or in communities close to the Tobermory ferry terminal. The local day trip market for Manitoulin Island is not strong.

Time Spent in Ontario on the Total Trip¹

The average length of time away from home associated

with a trip made to Manitoulin Island was 10.2 days. Respondents in the combined road and ferry samples spent an average length of stay of 8.4 days in the Province. Those travelling to the Island by highway stayed somewhat longer than those travelling by ferry. Respondents in the road sample stayed an average of 10.9 days while those in the ferry sample stayed an average of 7.4 days.

Number of Days in Ontario	Per Cent Respondent-Parties Combined Sample
Up to 1 day	2.8%
2-3 days—weekend	17.4
4-14 days—major part of two weeks vacation . .	68.2
Over 14 days	10.3
Did Not State	1.3
TOTAL	100.0%

Manitoulin Island seems, therefore, to attract parties whose holiday is focused essentially upon Ontario, particularly northern Ontario. It is not a significant recipient of cross-continental or macro-regional tourist traffic.

Time Spent on Manitoulin Island¹

An analysis of the responses of the combined sample revealed an average of 3.9 days spent on the Island. This was 38.2 per cent of the reported planned average length of complete trips and 46.4 per cent of the average time spent in Ontario. While many visitors, particularly cottagers, spent their entire holiday on Manitoulin, the Island is essentially a holding area in the travel pattern for a large number of tourists rather than a final destination. This is to be expected since a large percentage of the Island's visitors are engaged in a general landscape tour.

¹For greater detail, see Appendix Table XVII.

¹For greater detail, see Appendix Table XVIII.

There were significant differences revealed in the ferry and road samples. The average length of stay for the ferry sample was 3.1 days which was 33.0 per cent of their estimated mean trip duration of 9.4 days. In the road sample, the average length of stay on the Island reached 5.9 days which was 49.5 per cent of the planned average length of trip for this group. The higher percentages for the length of stay on the Island revealed in the road sample are probably attributable to a number of factors. Day trippers are more frequent on this route as well as cottagers. These visitors probably spend their entire time on the Island and increase the averages for the route. In effect, Manitoulin Island appears to be a final destination area for a higher percentage of visitors using the highway exit rather than the ferry.

Length of Stay	Per Cent Respondent-Parties Combined Sample
Did not stop—passed through	9.0%
1 day or less—not overnight .	12.1
1 night, part or all of 2 days . .	22.9
2 - 4 nights	24.9
5 - 10 nights	18.1
Over 10 nights	11.8
Did Not State	1.2
Total	100.0%

It is interesting to note that 9 per cent of the combined sample of respondents did not stop on the Island. About 12.1 per cent reported this fact in the ferry sample and 1.3 per cent in the road survey. These parties must con-

sider that the time saved returning from a holiday trip or moving towards southern Ontario points justifies the cost involved in a ferry crossing. Considering the highway network of southern and central Ontario, it seems likely that many parties adopting this procedure lived close to the ferry terminal and were heading home from an extended trip. For others, the novelty of the ferry ride and curiosity of the Island itself were also significant factors.

Another 12.1 per cent of the respondents stayed one day or less but not overnight. This group represented 13.8 per cent of the ferry sample and 7.9 per cent of that taken on the highway. Factors noted in a previous discussion of differences between the samples in the average length of stay per party likely apply in this instance.

As many as 22.9 per cent of the visitors stayed only one night or part or all of two days. Most of these people were probably on a general landscape tour and their short stay suggests that the Island's holding power was not strong for this group. In the road sample, 13.3 per cent of the respondents fell into this category, but in the ferry investigation there were 26.8 per cent.

A further 24.9 per cent stayed two to four nights on the Island. The percentage for the road sample was 27.1 and that for the ferry was 24.1 per cent.

Of the combined sample, 18.1 per cent stayed between five and ten nights and 11.8 per cent over ten nights. About 23.1 per cent of the respondents in the ferry sample and 46.7 per cent in the road interview fell into these two time categories. The difference in this case may be due to the fact that the highway is the major means of access for cottagers who stayed extended periods and tended to increase the percentages in that sample.

USAGE OF FACILITIES AND TOURIST ACTIVITY PATTERNS¹

A substantial portion of the questionnaire was devoted to the activity patterns of visitor-parties. The results of an analysis of the responses are summarized in this section of the report.

Areas Visited, Facilities Used or Planned to Use on Trip

Respondents were asked to check the actual number of facilities used during their trip or those facilities they intended to utilize during their trip. Provision was made for the writing-in of additional non-listed areas or facilities.

The 834 respondent-parties utilized a total of 4,222 facilities—an average of 5.1 facilities per respondent-party—on their trip that included a visit to Manitoulin Island. The more significant groupings are discussed below.

The Martyrs' Shrine and Sainte-Marie Among the Hurons, both on the outskirts of Midland, were visited by only 1.78 per cent of the respondents. In the road sample, the percentage was 3.24 or 4.4 times that of the ferry investigation. Apparently a visit to Sainte-Marie Among the Hurons is not usually incorporated with travel to or through Manitoulin Island. As the historic site becomes better known the pattern may change somewhat.

With its much publicized Flower Pot Islands, Georgian Bay Islands National Park, which is located in close proximity to the ferry terminal at Tobermory, attracted 3.17 per cent of all respondents in its grouping. The reason for the low percentage in the ferry sample (0.94 per cent) is difficult to explain. Perhaps many actually visited this site after the ferry interview even though they did not plan to do so at the time.

A surprisingly small percentage of respondents in this category (only 4.94 per cent) indicated visits to other parks during their trip. There are no parks on Manitoulin Island but numerous provincial developments are located in the Georgian Bay region including the large Killarney Provincial Park. Attendance at this park might be considerably increased if a direct access road was made available from White Fish Falls on Highway 68. The present access via Highway 637 requires a substantial diversion for tourist traffic moving through the Georgian Bay region.

Respondents to the combined road and ferry samples indicated that they used a total of 782 accommodation types. There were 265 indications in the road sample and 517 in the ferry survey. Some respondents did not answer this question while others gave considerable detailed information. The foregoing summation of the results of the analysis of replies provides a reasonable representation of the relative significance of types of accommodation used by tourists in the region.

Motels occupied the dominant position. They totalled 38.8 per cent of all mentions in the combined sample.

Accommodation Used On Trip

Type	Per Cent Total Responses for Class of Facility		
	Ferry Sample	Road Sample	Combined Sample
Hotel Room(s).....	4.2 %	9.4 %	6.0 %
Motel Room(s).....	36.4	43.4	38.8
Tourist Home(s), Cabins and Cottages	24.0	2.3	16.6
Friend's Home.....	12.9	15.8	13.9
Trailer Camp.....	3.9	10.6	6.1
Campsites.....	18.6	18.5	18.6
Total.....	100.0 %	100.0 %	100.0 %

Per Cent of Total—

All Facilities..... (15.07 %) (20.98 %) (18.52 %)

The ratio for the ferry investigation was 36.4 per cent and 43.4 per cent in the road sample. The difference between the samples in this case is not significant.

Although the home or cottage of friends or relatives was found to occupy a much more significant position in the Department's other tourist accommodation studies, in the Manitoulin Island Survey, this factor represented only 13.9 per cent of the total mentions.

Since a large proportion of the accommodation units on Manitoulin Island are cabins and housekeeping cottages, these units, along with tourist homes, were quite strongly represented — 16.6 per cent.

Following a commonly encountered pattern, hotel rooms proved to be relatively unimportant accounting for only 6.0 of the total percentage.

Trailer camp and campsites combined accounted for 24.7 per cent of the total mentions. About 9.8 per cent of the respondent-parties in the combined sample hauled mobile homes and camper units on their trip.

Beverage Services	Per Cent Total Responses for Class of Service		
	Ferry Sample	Road Sample	Combined Sample
Brewers' Retail Store..	24.3 %	40.7 %	32.5 %
Liquor Store.....	58.4	42.0	50.2
Public Beverage Room	17.3	17.3	17.3
Total.....	100.0 %	100.0 %	100.0 %

Per Cent of Total—

All Facilities..... (9.17 %) (12.86 %) (10.71 %)

In the combined sample, there was a total of 452 mentions of the use of beverage services. This was 54.2 per cent of the total number of respondent-parties.

Purchase of beverages in liquor stores was strongly represented. About half of all mentions in relation to this class of service fell into this category; the figure ran as high as 58.4 per cent in the ferry sample.

¹For greater detail, see Appendix Tables XIX, XIXA and XIXB.

Purchases in Brewers' Retail Stores totalled 32.5 per cent. This was about 1.9 times that percentage indicated for the use of beverage rooms.

General Retail Stores	Per Cent Total Responses for Class of Facility		
	Ferry Sample	Road Sample	Combined Sample
Grocery Store.....	45.3 %	32.7 %	39.6 %
Drug Store.....	13.0	21.3	16.8
Clothing Store.....	12.3	16.9	14.4
Hardware Store.....	14.1	15.2	14.6
Other Stores.....	15.3	13.9	14.6
Total.....	100.0 %	100.0 %	100.0 %
Per Cent of Total—			
All Facilities.....	(27.11 %)	(31.51 %)	(28.94 %)

In the combined sample there was a total of 1,222 mentions of the use of general retail facilities. This was an average of 1.5 per party. There were 668 mentions in the ferry sample and 554 in the road survey. Corresponding average ratios were 1.1 and 2.3 respectively.

As might be expected the grocery store was most frequently mentioned. In the combined sample, it represented 39.6 per cent of the total volume of facilities noted which was 2.4 times the next most popular service, namely the drug store. Differences in percentages for the ferry and road samples are substantial. Drug stores in the combined sample accounted for 16.8 per cent of the total. In this case the variation between the ferry and road samples is again noticeable and opposite to that related to grocery stores.

Percentages for clothing, hardware and miscellaneous stores were similar varying from 14.4 to 14.6 per cent. Differences between the road and ferry samples were minimal in this case.

Selected Recreation Services	Per Cent Total Responses for Class of Service		
	Ferry Sample	Road Sample	Combined Sample
Boat Rental.....	85.6 %	67.3 %	78.1 %
Golf Course.....	11.0	13.9	12.2
Movie Theatre.....	3.4	18.8	9.7
Total.....	100.0 %	100.0 %	100.0 %
Per Cent of Total—			
All Facilities.....	(5.93 %)	(5.75 %)	(5.85 %)

There were 193 mentions for the use of boat rental services in the combined samples which was an average of 0.2 per party for the 834 respondents. Boat rental represented 78.1 per cent of all mentions in this class. The differences in the road and ferry samples is considerable in this respect but the dominance of boat rental in the group of the three selected services is strongly maintained.

Golf received only 30 mentions or an average of 0.04 per party in the combined sample. This activity received 12.2 per cent of all mentions in this category and the difference between the road and ferry samples was small.

Movie theatres received only 24 mentions. However, in terms of the percentage distribution among the three services, they were fairly significant. Cottagers on an extended holiday in a particular area often use local theatres notably of the drive-in variety.

Forty-three visits to hospitals, doctors or dentists were mentioned. Of these, about 90 per cent were associated with the road sample. Some services of this type, such as visits to doctors or out-patient services, were used by those cottagers who resided for an entire summer season on the Island.

Respondents' Rating of Tourist Facilities in the Region¹

Facility	Number of Respondents	Excellent	Good	Percentage Rating of Facility Fair	Poor
1. Accommodation					
(a) Hotels, Motels.....	330	28.2 %	55.5 %	14.8 %	1.5 %
(b) Cabins, Cottages Tourist Homes.....	128	35.2	43.0	20.3	1.5
(c) Camping Facilities.....	52	34.6	38.5	17.3	9.6
Total 1.....	510	30.6 %	50.6 %	16.5 %	2.3 %
2. Food					
(a) Quality of Restaurant Food.....	365	17.3 %	56.4 %	21.4 %	4.9 %
(b) Quality of Restaurant Service.....	100	16.0	43.0	32.0	9.0
(c) Quality of Dining Rooms.....	47	29.8	27.7	34.0	8.5
Total 2.....	512	18.2 %	51.2 %	24.6 %	6.0 %
3. Service Stations.....	185	19.5 %	51.9 %	20.0 %	8.6 %
4. Recreation and Entertainment					
(a) Recreation.....	25	40.0 %	24.0 %	24.0 %	12.0 %
(b) Entertainment.....	43	7.0	—	16.3	76.7
(c) Children's.....	16	—	18.7	37.5	43.8
Total 3.....	84	15.5 %	10.7 %	22.6 %	51.2 %
5. Local Prices.....	142	0.7 %	16.2 %	65.5 %	17.6 %
6. Closing Hours.....	18	—	5.6	38.9	55.5
7. Local Attitudes to Visitors.....	147	57.2	34.0	6.8	2.0

An analysis of the replies to this question disclosed little variation between the road and ferry samples. The following discussion is, therefore, restricted to the results of the combined sample.

The number of respondents who rated the individual facilities varied greatly. Obviously, a facility cannot be rated unless it is used or observed and not all parties used or observed all facilities. Some simply did not wish to pass judgement.

The higher incidence of response is, in part, a reflection of a widespread usage of a particular facility. In other community studies carried out by the Travel Research Branch, there was a marked correlation between positive or favourable ratings and the high incidence of response, and also between negative ratings and the low incidence of response.

The implications of the foregoing remarks with respect to an interpretation of the accompanying table might be summarized as follows; when the response is high and the rating of a facility or service is poor, the situation is very serious because respondents are naturally inclined to

avoid criticism. When the response is high and most of the ratings vary in the excellent to good categories, then the unsatisfactory group may be somewhat larger than indicated.

The total accommodation plant of the region (including hotels, motels, cabins, cottages and tourist homes, and camping areas) was rated excellent to good by 81.2 per cent of the respondents. Only 2.3 per cent indicated that facilities of this type were poor and 16.5 per cent accorded them only a fair rating.

In general, visitor experience with the Island's accommodation was satisfactory. It is significant, however, that campsites were rated fair to poor by 26.9 per cent of the 52 respondents evaluating these facilities — a revelation worthy of note since all campsites on the Island are privately owned and operated.

Respondents' rating of food services suggest that there is probably considerable need for upgrading. About 69 per cent of the responses accorded a good to excellent rating; however, when these categories were separated, it was discovered that only 18.2 per cent of the 512

¹For greater detail, see Appendix XX.

respondents rated the food services as excellent; 30.6 per cent categorized this facility as ranging from fair to poor.

Much of the same overall pattern was revealed with respect to service stations. An excellent to good rating was accorded these facilities in 71.4 per cent of the replies related to this vital service. In 28.6 per cent of the responses, however, a fair to poor judgement was listed.

The ratings for recreation, entertainment and children's facilities is a cause for major concern. While the volume of responses was not large, previous remarks with respect to hesitancy on the part of people to criticize should be noted.

Some 51.2 per cent of those indicating a rating for these facilities considered them to be poor and another 22.6 per cent considered them to be only fair. In retrospect, it is fairly obvious that a great number of visitors remained dissatisfied with their holiday while on the Island or in the region itself. The general impression that is conveyed is simply that there is not enough to do on Manitoulin Island, and major improvements are obviously required to rectify this situation.

Local prices were rated only fair by 65.5 per cent of the respondents and poor by 17.6 per cent. In effect, the pricing situation of the Island was considered less than satisfactory by 83.1 per cent of the visitors.

The overall cost of a holiday on Manitoulin Island, for those camping or staying at commercial establishments, is reasonable and comparable with any point in Ontario. Tourists who purchased restaurant meals or short order items and confections while travelling through or stopping overnight on the Island may have accounted for the low satisfaction rating. Also, comments made could reflect customer satisfaction only, and not the price per se.

Early closing hours proved irritating for a large percentage of the visitors. Of those rating this aspect, the majority (55.5 per cent) considered them to be poor and 38.9 per cent only fair. Significantly, only 5.6 per cent rated this aspect as good. A low volume of response to this question should not be interpreted as a lack of visitor concern with this feature. Although there appears to be a need for some change in this instance, the whole problem is likely interlinked with the undesirable ratings given to entertainment and recreation. Places "close up" and activity "dies away" too early to suit many of the Island's tourists.

Local attitudes to visitors were considered excellent by 57.2 per cent of those rating this aspect and good by 34.0 per cent. Only 2 per cent considered this aspect to be poor and another 6.8 per cent gave it a fair rating. It appears that local residents create a favourable impression upon the bulk of the visitors which is extremely important to the tourist economy.

Tourist ratings for taverns and cocktail lounges were not included in the foregoing summary table because there were only 11 respondents who rated these facilities. Five respondents rated the taverns as "fair"; one rated them as "good". Three respondents rated cocktail lounges as excellent and two as good. Although a con-

siderable proportion of the tourists made use of these facilities, it may be assumed that the majority did not wish to express an opinion on the quality of the taverns or lounges for personal reasons.

Recreation Activities Pursued on Visit to the Region¹

Activity	Per Cent Recorded by Parties Combined Sample
1. Water-based Activities	
Fishing	24.7%
Boating	20.7
Swimming	21.1
Sub-total	66.5%
2. Picnicking	12.8
3. Golfing	1.5
4. Visiting Other Historic Sites	12.2
5. Attending Movies	1.7
6. Other	5.3
Total	100.0%

The 834 respondent-parties surveyed in this study reported that they had engaged in 1,504 recreational activities on their trip to Manitoulin Island. This was an average of 1.8 activities per party.

In terms of the average number of activities, there was a marked difference between the road and ferry samples. Respondents in the ferry sample indicated an average of 1.4 activities and those in the road investigations 2.8. In effect, respondent-parties in the road sample engaged in 2.0 times as many activities as those in the ferry sample. This is largely explained by the fact that the average length of stay of the road parties was 1.9 times that of those persons involved in the ferry sample.

The analysis of the responses of both samples revealed little variation insofar as the percentage distribution between specific activities pursued was concerned. Subsequent discussion will therefore be limited to the results of the combined investigations.

Outdoor recreational activities dominated the pattern accounting for at least 80.8 per cent of the type designated and probably close to 85 per cent if a proportion of items listed under "other" could be specifically allocated.

Of significance is the fact that 66.5 per cent of the activities engaged in by respondent-parties were fundamentally water-based. In all probability, a large portion of the picnicking also occurred in a setting in which water contributed to the aesthetic qualities of the landscape.

About 12.2 per cent of the activities involved visits to historic sites on the Island. Historical and educational activities are an important complement to any comprehensive and balanced tourist plant.

Golfing proved relatively unimportant; only 1.5 per cent of the total number of activities were allocated to this sport.

¹For greater detail, see Appendix Table XXI.

Points of Interest Visited on or Near Manitoulin Island¹

Points of Interest	Per Cent Ferry Sample	Per Cent Road Sample	Per Cent Combined Sample
1. Did Not Visit Any.....	75.6 %	39.6 %	65.2 %
2. Visited			
(a) Museums, Historic Buildings & Memorials			
Gore Bay Museum, Gore Bay.....	3.0	2.5	2.9
Roosevelt Memorial, Birch Island.....	1.5	10.0	3.9
Assiginack Museum, Manitowaning.....	1.4	1.2	1.3
Meldrum Bay Museum & Game Farm.....	2.0	1.3	1.8
Howland Museum, Little Current.....	3.2	0.8	2.5
St. Paul's Anglican Church, Manitowaning.....	2.4	10.4	4.7
Beaver Valley Museum, Espanola.....	1.3	9.2	3.6
Sub-total 2(a).....	14.8 %	35.4 %	20.7 %
(b) Scenic Areas			
Cup & Saucer Lookout.....	0.8 %	2.9 %	1.4 %
(c) Special Event			
Indian Pow-Wow, Wikwemikong.....	1.0	9.2	3.4
(d) Fish Hatchery, Sandfield.....	5.2	2.9	4.6
(e) Industrial Activities			
Brown's Paper Mill, Espanola.....	0.2	5.0	1.6
Rock Quarry, Willisville.....	—	0.8	0.2
Sub-total 2(e).....	0.2 %	5.8 %	1.8 %
(f) Other.....	2.4	4.2	2.9
Total 2.....	24.4 %	60.4 %	34.8 %
GRAND TOTAL.....	100.0 %	100.0 %	100.0 %

A list of twelve points of interest on Manitoulin Island or along Highway No. 68 (between Espanola and the crossing to Little Current) was presented to those answering the questionnaire. Respondents were asked to check any of the listed items that they had visited and to write in any additional non-listed attractions attended.

The most noticeable feature of the foregoing compilation is the fact that 65.2 per cent of all respondents indicated that they had not visited any attractions either on the Island or on the adjacent mainland to the north. Of those in the ferry sample, a surprisingly high percentage (75.6 per cent) stated that they had not visited any attractions; the percentage in the road sample was somewhat lower (39.6 per cent).

It is extremely difficult to explain this pattern (particularly that revealed in the ferry and combined samples) on the basis of data provided in this study. The average length of stay on Manitoulin Island of those in the ferry sample was 3.11 days; those in the road interview stayed an average of 5.91 days. All parties engaged on a general landscape tour of an area the size of Manitoulin Island might have been expected to have visited an average of at

least one attraction during a holiday of the length indicated.

If the results of the analysis to this question are accepted as a reasonable cross-section of the tourists in relation to the visitation of attractions, a number of explanations might be advanced. In fact, a combination of several is actually involved.

It might be that attractions are not sufficiently publicized on the ferry and at the crossing on Highway No. 68. The Souvenir Road Map or Directory put out by local Merchants and provided to the Island's tourists is primarily taken up with advertising by commercial establishments. A map put out by the Manitoulin-Espanola Regional Tourist Council and supplied to its member organizations was revised in 1969 to show points of interest located on the Island. A new tourist booklet also emerged in 1969. Prepared by Edward Dreier and Alex Wilson Publications, the booklet entitled "Manitoulin, Espanola and the North Channel," lists and briefly describes most of the Island's allurements.

It might also be concluded that the attractions are of an extremely low quality and do not warrant the time and

¹For greater detail, see Appendix Table XXII.

cost involved in visitation. Even if this were true, it is likely that people engaged in a landscape tour of several days duration would be drawn at least to one or two attractions.

Another possible explanation that might be forwarded is that the majority of tourists to Manitoulin are there to enjoy the outdoor recreation experience found particularly on the shoreline areas and are not interested in other activities.

Of the various points of interest, museums and historic sites attracted the highest number of visitors; 20.7 per cent of the respondents in the combined sample indicated a visit of this type. Of all recorded visitations, 59.6 per cent were to museums, historic buildings and monuments. St. Paul's Anglican Church in Manitowaning and the Roosevelt Memorial on Birch Island received the highest recording, but the combined total of only 72 visiting parties was low considering the strategic locations of these sites on travel routes (particularly as regards the latter). The Beaver Valley Museum which contains arti-

facts of early settlement and the pulp and paper industry ranked third with 30 visiting parties. This museum, however, is actually on the outskirts of Espanola. (It should be noted here that the Beaver Valley Park in Espanola has been closed due to lack of interest by the travelling public.)

The Fish Hatchery at Sandfield recorded 13.1 per cent of all listed attractions visited and requires a three-mile diversion for traffic moving north and south on Highway 68.

The Indian Pow-Wow, a special event at Wikwemikong, received 9.7 per cent of all listings by respondents though only 28 parties were actually involved.

Of the respondent-parties, 4.5 per cent toured the Brown Forest Industries Paper Mill in Espanola; the mill will be closed to the public in 1969.

Only 4.1 per cent of the recorded visits were associated with the Cup and Saucer Lookout. This scenic feature is situated at the junction of Highway 540 and Bidwell Road on Manitoulin Island.

EXPENDITURE PATTERNS¹

Information was obtained from the questionnaires with respect to expenditures on Manitoulin Island with a detailed breakdown of costs by service and commodity the results of which are now summarized.

The average expenditure per respondent-party on Manitoulin Island was approximately as follows:

Respondent-Parties Sample	Average Expenditure
Ferry	\$ 81.06
Road	\$174.27
Total—All Respondent-Parties	\$105.83

These figures relate only to expenditures on Manitoulin Island, including any ferry costs that might have been incurred.

One must keep in mind that these figures are only approximations and cannot be looked upon as absolutely accurate. However, they do give a rough estimate of what visitor-parties are spending on Manitoulin Island.

One must also remember that we are dealing with a representative cross-section which is not expandable to the universe. The survey does not deal with the economic impact of boating, hunting and other activities that are undertaken during the year and consequently, no figures relating to expenditures are available for these activities.

As can be seen, the average expenditure of those in the road sample was much higher (more than double in fact) than of respondent-parties in the ferry sample. The difference may be attributed in part to the fact that respondent-parties in the road sample spent twice as long on the Island (5.91 days) compared to those in the ferry sample (3.11 days).

Still, there is really no adequate explanation of this very large discrepancy and it would be necessary to conduct a further investigation of expenditure patterns in order to produce a satisfactory reason for the difference in expenditures between the ferry and road samples.

The average expenditure per respondent-party by category of those parties interviewed on the ferry was as follows:

Category	Average	Per Cent
Food and Beverage.....	\$17.52	33.50 %
Gifts.....	2.14	4.09
Accommodation.....	21.40	40.92
Entertainment.....	0.90	1.72
Attractions.....	0.15	0.29
Personal Use Merchandise...	5.49	10.50
Other.....	4.70	8.98

Average Expenditure—

All Categories..... \$52.30 100.00 %

¹For greater detail, see Appendix Tables XXIII, XXIVA and XXIVB.

The average expenditure in all categories was \$52.30 for the ferry sample—a discrepancy between the average expenditure of \$81.06 shown in Table XXIII—due, in all probability, to the fact that respondents usually have difficulty recalling the exact amounts spent on casual expenditures. Moreover, the average expenditure of \$52.30 per respondent-party by category failed to include the cost of fares. This was tabulated in the average expenditure of \$81.06.

Examining expenditures of those in the road sample separately, it was found that the average expenditures per respondent-party by category were as follows:

Category	Average	Per Cent
Food and Beverage.....	\$55.29	35.33 %
Gifts.....	11.22	7.17
Accommodation.....	39.54	25.27
Entertainment.....	7.64	4.88
Attractions.....	2.80	1.79
Personal Use Merchandise...	21.00	13.42
Other.....	19.00	12.14
Average Expenditure—		
All Categories.....	\$156.49	100.00 %

The average expenditure shown in Table XXIII (\$174.27) varied with the average expenditure of those on the road sample (\$156.49). A comparison of expenditures by category between the two samples revealed no significant variations.

Again, it must be emphasized that these data are only approximations of the actual expenditures. Questionnaire reporting of expenditures involves problems of total recall and the inevitable inaccurate detailing of the actual expenditures made. Therefore, although these figures serve in giving an approximate estimation of the amount of money spent by parties in either of the road or ferry samples, they cannot be treated as being 100 per cent accurate.

In a separate study¹ done by the Travel Research Branch of the Ontario Department of Tourism and Information, the following total number of visitors to Manitoulin Island and their expenditures for the year 1967 was obtained:

Origin of Visitors	Number of Visitors to Manitoulin Island, 1967
Ontario	67,900
Other Canadian Provinces ...	1,700
U.S.A.	18,200
TOTAL	87,800

¹Number of Visitors to Ontario Vacation Areas and Their Expenditures (Direct) Compared with the Expenditures of Local Residents, Manitoulin, Vacation Area 24, Travel Research Branch, Ontario Department of Tourism and Information, 1967.

Estimated expenditure of visitors to the Island in 1967 was:

Origin of Visitors	Estimated Total Expenditure, 1967
Ontario	\$1,579,000
Other Canadian Provinces	43,700
U.S.A.	465,000
TOTAL	\$2,087,700

This separate study, however, also compared the

estimated total expenditure of local residents during the year 1967 with the total expenditures made by visitors to the Island in that year.

In this survey, the estimated total expenditure amounted to \$13 million, 84 per cent of which was spent by local residents and 16 per cent of which was spent by visitors to the Island in that year. As there is always a close correlation between spending and the amount of employment generated by these expenditures, it could be said that tourist spending created approximately 16 per cent of all employment on Manitoulin—a factor which should be brought to the attention of all those desirous of expanding the Island's tourist industry.

MOTIVATION OF VISITS TO MANITOULIN ISLAND

Main Reason for Travel to the Island¹

Respondents were asked, "What was your main reason for your visit to Manitoulin Island?" The data obtained from their replies are shown in summary form below.

Main Reason for Trip to Manitoulin Island

Reason	Percentage of Respondents in		
	Ferry Sample	Road Sample	Combined Samples
A. Tourism and Recreation			
1. Just Vacationing.....	53.0 %	51.7 %	52.6 %
2. Passing Through.....	22.9	5.0	17.7
3. Camping.....	6.2	15.8	9.0
4. Picnicking.....	—	0.4	0.1
Sub-total.....	82.1 %	72.9 %	79.4 %
5. Visiting Friends & Relatives.....	6.1	9.2	7.0
Total A.....	88.2 %	82.1 %	86.4 %
B. Non-Tourism and Recreation			
1. Personal & Family Affairs.....	3.7 %	2.1 %	3.2 %
2. Business.....	2.5	5.4	3.4
3. Shopping.....	0.2	0.4	0.2
4. Other.....	—	8.8	2.5
Total B.....	6.4 %	16.7 %	9.3 %
C. Did Not State.....	5.4	1.2	4.3
GRAND TOTAL.....	100.0 %	100.0 %	100.0 %

Tourist, recreation and general leisure-time travel was the dominant factor. Those who fell into this general category consisted of about 88 per cent of the respondents in the ferry interview, 82 per cent of the respondents in the road sample, and 86 per cent of the respondents in the combined investigations. Stipulated non-tourist and recreation reasons for travel were modest and assumed their highest proportions in the highway sample. This is to be expected since the primary socio-economic organization for the Island that generates this type of travel is focused upon the mainland to the north which is close by and accessible by highway.

Under the general tourism and recreation category, vacationing and "passing through" constituted 70.3 per cent of the reasons given. Visiting friends and relatives, which accounted for 29.9 per cent of the basic motivation for all trips over 25 miles from home in a recent Ontario study and often reaches 50 per cent or over when leisure-time travel is involved, was less important in this case.² The pattern is to be expected, however,

in any area with a modest resident population and substantial tourist appeal.

A comparison of the results of the ferry and road samples disclosed no meaningful difference with respect to the major categories of Tourism and Recreation and Non-Tourism and Recreation. Similarities in percentages for "just vacationing" proved remarkably similar at 53 per cent and 51.7 per cent. The difference between the samples with respect to "visiting friends and relatives" was not large—6.1 per cent and 9.2 per cent respectively.

There were noticeable differences in the motivational pattern of the two samples with respect to "passing through" and "camping". In the road sample, 15.8 per cent recorded camping as the main reason for their visit while only 6.2 per cent did so in the ferry sample. The difference is probably explained to a greater degree, by the cost of the ferry crossing. For a family of four, including two adults and two children over five years, a one-way trip involves a cost of about \$16; a round-trip tariff costs about \$32. If the party is hauling a trailer, the respective charges are approximately \$28.75 and \$57.50. Parties approaching from southern Ontario, who were engaged in a general landscape tour of the north, probably felt that the long trip around through Sudbury, with stops at parks and campsites enroute, was the most attractive proposition in their desire to minimize costs.

¹For greater detail, see Appendix Table IX.

²*A Study of Travel Habits of Ontario Households*. Travel Research Branch, Ontario Department of Tourism and Information, 1969.

It is difficult to advance any conclusive explanation for the difference in the results of the samples with respect to respondents reporting "passing through" as the main reason for their visit to Manitoulin Island. For those parties moving towards the densely populated areas of southern Ontario, there are no substantial savings in time or mileage involved in the use of the ferry that would compensate for increased costs. Perhaps many of the parties travelling on the ferry that reported "passing through" were actually engaged in a general landscape tour and decided to visit the Island out of curiosity. For some, particularly with regards to children, the novelty of a ferry ride may have been the major attraction.

Secondary Reasons for Visiting Manitoulin Island¹

Almost 60 per cent of the respondents did not reply to this question and about 18 per cent of those who did failed to provide a particular reason.

It might be reasonably concluded that for the majority of those visiting Manitoulin Island there were no secondary reasons motivating their travel pattern. The geographic location and socio-economic complexion of the area is such that visitation is essentially single purpose in nature.

How Manitoulin Island Was First Brought to the Attention of Visitors²

There was little variation in the responses to this question in the road and ferry samples. Percentages in the following table refer to the results of the combined sample.

Creation of an Awareness of the Island

Through	Per Cent All Respondent-Parties
1. Family or Friends	
In Canada	30.8%
In U.S.A.	16.7
Sub-total 1.	47.5%
2. Word-of-Mouth	14.1%
3. Business Contacts	
In Canada	3.7
In U.S.A.	1.2
Sub-total 3.	4.9%
4. Promotion and Advertising	
Advertisements or Brochures	12.8%
News Media	1.7
Sub-total 4.	14.5%
5. Other—Unspecified	16.8%
6. Did Not State	2.2
TOTAL	100.0%

¹For greater detail, see Appendix Table X.

²For greater detail, see Appendix Table XI.

Contacts with friends and relatives and "word-of-mouth" were said to have created an awareness of the Island in 61.6 per cent of the respondents. In contrast, business contacts were of minor significance having instilled an awareness of the tourist and recreation opportunities of the area in only 4.9 per cent of the visitors to Manitoulin.

General promotion and advertising were cited as the medium drawing the initial attention of the visitor to Manitoulin Island by only 14.5 per cent of those replying to the questionnaire. Insignificant was news media cited by only 1.7 per cent of the respondents. Advertising and brochures, with 12.8 per cent, actually ranked third among the identified ways through which initial attention to the Island was created. From recent studies carried out by this Department, it was discovered that people often have difficulty in recalling the effect of advertising and promotion in creating an awareness of any area and its effects upon a decision to visit that area at a future date. However, the results of this investigation are encouraging.

About 15.6 per cent of the respondents failed to reply to the question regarding repeat visitation to Manitoulin Island. However, some 84.4 per cent did indicate that they might return to visit the Island in the future.

Of course, many who planned to come again to the area will not realize this objective but, nevertheless, the results of the analysis of the responses to this question provide some general indication of visitor satisfaction and the tourist and recreation attractivity of the area. In fact, the actual volume of re-visitation indicates that many do indeed return.

The enjoyment of a general recreation, pleasure and vacation experience was given as the reason for a planned repeat visit by 65.7 per cent of the respondents. Since this was the general experience engaged in by most respondents, it can be concluded that the Island satisfied visitor requirements and expectations sufficiently to engender a desire for re-visitation in the pursuit of a similar holiday.

It is interesting to note that 67.8 per cent of those in the ferry sample intended a re-visit for the above reasons, but only 60.4 per cent did so in the road sample. The ferry crossing, in spite of the cost involved, probably increased the attractivity of the Island.

Personal reasons were given as the reason for a planned repeat visit by 10.4 per cent of the respondents. In the road sample, 16.3 per cent stated this was a factor while only 8.1 per cent indicated personal reasons in the ferry sample, a discrepancy due perhaps to personal ties between the Island residents and those on the north shore of the mainland.

First Visitation and Repeat Trips to Manitoulin Island¹

An analysis of the combined ferry and road samples revealed that 45.4 per cent of the respondent-parties were

¹For greater detail, see Appendix Tables XII and XIII.

making their first visit to Manitoulin Island. Another 52.4 per cent were repeat visitors; only 2.2 per cent of the respondents did not answer this question.

An acceptable ratio of first time to repeat visitors is often said to be 30:70 per cent respectively. If the ratio is lower than 30 per cent, it is felt that the geographic unit involved is not generating sufficient new visitors. A large percentage of the tourists in North America are engaged in a general landscape tour and seek out new routes and locations each year. Repeat visitors change their travel habits sooner or later particularly if they are not tied to an area through the ownership of summer resort properties. Although Manitoulin Island appears to meet the requirements for first-time visitors, there is a suggestion that it may not be building a sufficiently substantial base for repeat visitation. This may be due to an unsatisfactory impact upon the first-time visitor or the comparatively slow growth in vested property interests of the type that draw people back to the Island each year. Locational factors, however, seem to suggest that the present pattern may be the norm for Manitoulin Island

and will continue to persist for some time.

There was a marked variation between the two samples with respect to first-time and repeat visitation. In the ferry sample, 51.5 per cent of the respondents stated that it was their first visit as compared with 30.4 per cent of those in the road sample. It is difficult to explain this difference on the basis of information contained in the questionnaires. Possibly, the novelty of the ferry ride has a strong attraction for first-time visitors. The saturation and threshold for this experience, coupled with the cost involved, may encourage repeat visitors to use the road route. Cottagers, who in all probability form a substantial proportion of the repeat visitors, are more likely to place a greater emphasis upon highway accessibility.

Tourists were asked if they planned to visit the region again for any personal reasons or for the purposes of attending the winter carnival, or reasons of recreation, pleasure, vacationing, hunting and fishing. The combined sample may be a significant contributing factor to the observed difference.

APPENDIX I

Sampling Procedure

The sample of visitors to Manitoulin Island was conducted in the following manner:

Parties leaving on the ferry from South Baymouth to Tobermory and passenger vehicles leaving the Island via road, i.e. using Highway 68 and passing through Little Current during the month of July constituted the sample's universe.

Ferry passengers were personally interviewed on alternative days of the week: July 2, 3, 8, 9, 14, 15, 20, 21, 26, and 27. On each of these days it was possible to conduct interviews on two out of a total of four crossings from South Baymouth to Tobermory. On the ferry crossings 594 visitor-parties were interviewed.

Licence numbers of vehicles leaving the Island via Highway 68 were collected between the hours of 8 a.m. and 6 p.m. on the following days: July 4, 5, 10, 11, 16, 17, 22, 23, 28, and 29. From these licence numbers a stratified random sample was taken according to the origin of the visitors. Of the 600 questionnaires mailed, 240 were completed and returned.

The sample obtained was representative of a cross-section of visitors and was not intended to be representative of the universe of tourists who visited the Island throughout the year.

APPENDIX II

Accommodation on Manitoulin Island

As shown in the accompanying table, "Accommodation Units on Manitoulin Island by Type and Distribution," there was a total of approximately 940 accommodation units of all types on Manitoulin Island.¹ Cabins and cottages dominated the pattern constituting 71.5 per cent of all available units. Rooms, hotels, lodges and motels comprised the rest.

Of the total number of units, about 67.1 per cent were located on the Eastern Region of Manitoulin. The

Region, it is interesting to note that 35.3 per cent of all accommodation on the Island is found along Highway 68, the major artery of tourist traffic. Little Current contains 159 units or 25.2 per cent of the total for the region and 16.9 per cent of the total for the Island. South Baymouth holds 73 units or 11.6 per cent of the total for the region and 7.8 per cent for that of the Island. Development around the terminus of the Tobermory ferry has, therefore, not been as strong as it has at Little Current which is adjacent to the highway crossing to the mainland. Of

Location	Rooms, Hotels and Lodges	Motel Units	Cabins and Cottages	All Units
	Number	Number	Number	Number
Eastern Region				
Highway 68				
Little Current.....	53	46	60	159
Sheguiandah.....	3	—	53	56
Manitowaning.....	9	—	12	21
South Bay —				
Lake Huron.....	—	—	23	23
South Baymouth.....	5	30	38	73
Sub-total.....				332 35.3 %
Other Eastern.....				299 31.8
Central Region.....				282 30.0
Western Region.....				27 2.9
Total.....				940 100.0 %

Eastern Region is here defined to include that portion of the Island situated to the east of an imaginary line drawn between and including the following three locations—West Bay, Lake Mindemoya and Providence Bay. The Central Region (that portion of Manitoulin Island lying eastward from an imaginary line drawn between Cook's Dock and Wood Bay and the boundary of the Eastern Region) contained 30 per cent of the total number of units. The Western Region supported only 2.9 per cent.

While the bulk of accommodation lies in the Eastern

course, Little Current is the major population centre of the Island and development has, to some extent, been influenced by business as well as tourist considerations.

Development in the Central Region has been fairly extensive and widespread in contrast to the western section of the Island which contains few lakes and has experienced a limited growth since it is more remote from the main stream of tourist traffic. Meldrum Bay has only 17 units which suggests that only a modest volume of traffic passes through this area.

Accommodation Units on Manitoulin Island by Type

Location	Rooms, Hotels and Lodges	Motel Units	Cabins and Cottages	Total
Eastern Region — Lakes.....	14	—	223	237
Central Region — Lakes.....	3	11	118	132
Western Region — Lakes.....	—	—	10	10
Sub-total.....				379 40.3 %
Other Accommodation.....				561 59.7
Total.....				940 100.0 %

¹"Where to Stay in Ontario, 1968" — Manitoulin, Vacation Area 24, Department of Tourism and Information, Parliament Buildings, Toronto, Ontario.

Of all accommodation units on the Island, 40.3 per cent are situated on the shores of inland lakes. With the exception of 11 motel units, all of which are small operations, these facilities are entirely cabins and cottages.

Currently, there are four private tent-and-trailer-camping grounds on Manitoulin Island; no provincial facilities have been developed to date. One private facility at Providence Bay, which is operated in conjunction with an 11-room lodge, offers 25 tent sites and 50 trailer spaces. Another tent-and-trailer ground on Lake Mindemoya is managed in conjunction with a cabin-rental enterprise. A third campground on Lake Kaga-

wong is combined with a five cottage-rental enterprise. A tent-and-trailer site on the northern shore of Manitou Lake has been developed in conjunction with a cabin enterprise.

Many tourist trailer parks are in the process of development. Purchased by ARDA (Agricultural Rehabilitation Development Association), the piece of land at the end of Lake Wolsey will, in the future, be operated as a trailer park by the Western Manitoulin Board of Trade. Two parks are located in the West Bay Reserve—one right in West Bay on the North Channel and another on the northern end of Lake Mindemoya.

Accommodation Units on Manitoulin Island by Type and Destination

Location	Rooms, Hotels and Lodges		Motel Units		Cabins and Cottages		Total All Units	
	Number	Per Cent	Number	Per Cent	Number	Per Cent	Number	Per Cent
A. Eastern Region								
Highway 68								
Little Current.....	53		46		60			
Sheguiandah.....	3		—		53			
Manitowaning.....	9		—		12			
South Bay — Lake Huron	—		—		23			
South Baymouth.....	5		30		38			
Settlements								
Mindemoya.....	—		9		2			
Bay of Sounds.....	11		10		30			
Lakes.....	14		—		223			
Sub-total.....	95	63.3 %	95	80.5 %	441	65.6 %	631	67.1 %
B. Central Region								
Settlements								
Gore Bay.....	40		12		8			
Bay of Sounds.....	—		—		90			
Lakes.....	3		11		118			
Sub-total.....	43	28.7 %	23	19.5 %	216	32.2 %	282	30.0 %
C. Western Region								
Settlements								
Meldrum Bay.....	12		—		5			
Lakes.....	—		—		10			
Sub-total.....	12	8.0 %	—	—	15	2.2 %	27	2.9 %
TOTAL.....	150	100.0 %	118	100.0 %	672	100.0 %	940	100.0 %
	(16.0 %)		(12.5 %)		(71.5 %)		(100.0 %)	

APPENDIX III

TABLE I

Province or State of Origin of Respondent-Parties Visiting Manitoulin Island

Province or State of Origin	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Ontario	374	62.96%	145	60.42%	519	62.23%
Quebec	6	1.01	3	1.25	9	1.08
Manitoba	4	0.67	—	—	4	0.48
Saskatchewan	7	1.18	1	0.42	8	0.96
Alberta	4	0.67	1	0.42	5	0.60
British Columbia	1	0.17	2	0.83	3	0.36
Atlantic Provinces	1	0.17	1	0.42	2	0.24
Massachusetts	1	0.17	1	0.42	2	0.24
Connecticut	1	0.17	1	0.42	2	0.24
New York State	11	1.85	4	1.67	15	1.80
Pennsylvania	7	1.18	5	2.08	12	1.44
Ohio	57	9.60	33	13.75	90	10.79
Michigan	74	12.46	29	12.08	103	12.35
Wisconsin	3	0.50	2	0.83	5	0.60
Illinois	6	1.01	2	0.83	8	0.96
Other	37	6.23	10	4.16	47	5.63
TOTAL	594	100.00%	240	100.00%	834	100.00%

TABLE II

Home Town of Ontario Respondent-Parties Visiting Manitoulin Island

Home Town	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Toronto	79	21.12 %	41	28.27 %	120	23.12 %
Ottawa	5	1.34	1	0.69	6	1.16
Hamilton	24	6.42	8	5.52	32	6.16
London	18	4.81	2	1.38	20	3.85
Kitchener	17	4.54	4	2.76	21	4.05
Windsor	8	2.14	6	4.14	14	2.70
Sudbury	20	5.35	12	8.27	32	6.16
Niagara Falls	1	0.27	1	0.69	2	0.39
Kingston	3	0.80	1	0.69	4	0.77
Other Ontario	198	52.94	66	45.52	264	50.87
Did Not State	1	0.27	3	2.07	4	0.77
TOTAL ONTARIO	374	100.00 %	145	100.00 %	519	100.00 %
Other than Ontario ..	220	37.04	95	39.58	315	37.77
TOTAL	594	100.00 %	240	100.00 %	834	100.00 %

TABLE III

Number of Persons in Respondent-Parties Visiting Manitoulin Island

Number of Persons in Party	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
One.....	22	3.70 %	13	5.42 %	35	4.20 %
Two.....	221	37.20	86	35.83	307	36.81
Three.....	100	16.84	27	11.25	127	15.23
Four.....	139	23.40	52	21.66	191	22.90
Five.....	64	10.77	28	11.67	92	11.03
Six.....	24	4.04	13	5.42	37	4.44
Seven or More.....	15	2.53	21	8.75	36	4.31
Did Not State.....	9	1.52	—	—	9	1.08
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %
Average Number of Persons Per Respondent-Party						
	3.28		3.67		3.39	

TABLE IV

Age Group of Heads of Respondent-Parties Visiting Manitoulin Island

Age Group	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Under 20 years.....	6	1.01 %	6	2.50 %	12	1.44 %
20-34 years.....	183	30.81	63	26.25	246	29.50
35-49 years.....	234	39.39	82	34.16	316	37.89
Over 50 years.....	154	25.93	88	36.67	242	29.01
Did Not State.....	17	2.86	1	0.42	18	2.16
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %
Average Age of Head of Respondent-Party.....						
	41 years		43 years		41.5 years	

TABLE V

Number of Persons in Respondent-Parties Visiting Manitoulin Island by Category and Age Group

Total — Ferry and Road Samples

Number of Persons in Party	ADULT MEN		ADULT WOMEN		TEENAGERS		CHILDREN		TOTAL	
	18 Years or more Number	Per Cent of Persons	18 Years or more Number	Per Cent of Persons	13-17 Years Number	Per Cent of Persons	12 Years or less Number	Per Cent of Persons	Number of Persons	Per Cent of Persons
One.....	627	60.93 %	570	60.00 %	88	38.94 %	128	21.88 %	1,413	50.65 %
Two.....	258	25.07	254	26.73	108	47.79	226	38.63	846	30.32
Three.....	81	7.87	78	8.21	21	9.29	147	25.13	327	11.72
Four.....	40	3.89	36	3.79	4	1.77	44	7.52	124	4.45
Five.....	10	0.98	5	0.53	5	2.21	20	3.42	40	1.43
Six.....	6	0.58	—	—	—	—	6	1.03	12	0.43
Seven or More.....	7	0.68	7	0.74	—	—	14	2.39	28	1.00
TOTAL.....	1,029	100.00 %	950	100.00 %	226	100.00 %	585	100.00 %	2,790	100.00 %
		36.88 %		34.05 %		8.10 %		20.97 %		100.00 %

TABLE VI

Composition of Respondent-Parties Visiting Manitoulin Island by Category and Age Group

Total-Ferry and Road Samples

Number of Persons in Party	ADULT MEN		ADULT WOMEN		TEENAGERS		CHILDREN	
	18 Years or more Number of Parties	Per Cent	18 Years or more Number of Parties	Per Cent	13—17 Years Number of Parties	Per Cent	12 Years or less Number of Parties	Per Cent
One.....	627	78.67 %	570	77.66 %	88	58.28 %	128	41.56 %
Two.....	129	16.18	127	17.30	54	35.76	113	36.69
Three.....	27	3.39	26	3.54	7	4.64	49	15.91
Four.....	10	1.25	9	1.22	1	0.66	11	3.57
Five.....	2	0.25	1	0.14	1	0.66	4	1.30
Six.....	1	0.13	—	—	—	—	1	0.32
Seven or More.....	1	0.13	1	0.14	—	—	2	0.65
TOTAL.....	797	100.00 %	734	100.00 %	151	100.00 %	308	100.00 %

TABLE VII

Occupation of Heads of Respondent-Parties Visiting Manitoulin Island

Type of Occupation	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Respondents	Per Cent	Number of Respondents	Per Cent	Number of Respondents	Per Cent
Professional.....	90	15.15 %	34	14.16 %	124	14.87 %
Managerial/Owner.....	82	13.81	31	12.92	113	13.55
Sales.....	42	7.07	27	11.25	69	8.27
Clerical/Office.....	39	6.57	22	9.17	61	7.31
Skilled Labourer.....	145	24.41	63	26.25	208	24.94
Unskilled Labourer.....	8	1.35	5	2.08	13	1.56
Farmer/Tobacco Grower/Market Gardener...	23	3.87	5	2.08	28	3.36
Armed Forces/Police/Fire/Ambulance.....	11	1.85	4	1.67	15	1.80
Housekeeper/Housewife.....	2	0.34	4	1.67	6	0.72
Teacher/Lecturer/Professor.....	28	4.71	12	5.00	40	4.80
Student.....	6	1.01	—	—	6	0.72
Retired.....	29	4.88	24	10.00	53	6.35
Minister/Clergyman/Priest/Nun.....	4	0.67	3	1.25	7	0.84
Other.....	40	6.73	2	0.83	42	5.04
Did Not State.....	45	7.58	4	1.67	49	5.87
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE VIII

Number of Respondent-Parties Towing a Trailer on Visit to Manitoulin Island

Type of Trailer	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Camping Trailer.....	43	63.24 %	28	43.08 %	71	53.38 %
Boat Trailer.....	14	20.59	25	38.46	39	29.32
Mobile Home.....	4	5.88	7	10.77	11	8.27
Other.....	7	10.29	5	7.69	12	9.03
Total Number of Parties Towing a Trailer.....	68	100.00 %	65	100.00 %	133	100.00 %
Parties Not Towing a Trailer....	526	88.55	175	72.92	701	84.05
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE IX

Main Reasons for Visit to Manitoulin Island

Reason	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Camping.....	37	6.23 %	38	15.83 %	75	8.99 %
Picnicking.....	—	—	1	0.42	1	0.12
Business.....	15	2.53	13	5.42	28	3.36
Personal or family affairs.....	22	3.70	5	2.08	27	3.24
Just vacationing.....	315	53.03	124	51.67	439	52.64
Passing through.....	136	22.89	12	5.00	148	17.74
Shopping.....	1	0.17	1	0.42	2	0.24
Visiting friends or relatives.....	36	6.06	22	9.16	58	6.95
Other Reasons.....	—	—	21	8.75	21	2.52
Did Not State.....	32	5.39	3	1.25	35	4.20
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE X

Secondary Reasons for Visit to Manitoulin Island

Reason	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Camping.....	11	1.85 %	11	4.58 %	22	2.64 %
Picnicking.....	2	0.34	2	0.83	4	0.48
Business.....	4	0.67	3	1.25	7	0.84
Personal or family affairs.....	5	0.84	1	0.42	6	0.72
Just vacationing.....	49	8.25	33	13.75	82	9.83
Passing through.....	28	4.72	8	3.33	36	4.32
Shopping.....	12	2.02	20	8.33	32	3.84
Visiting friends or relatives.....	—	—	4	1.67	4	0.48
Other Reasons.....	108	18.18	38	15.84	146	17.50
Did Not State.....	375	63.13	120	50.00	495	59.35
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE XI

How Manitoulin Island was Brought to the Attention of Visitors

	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Advertisements or brochures.....	80	13.47 %	27	11.25 %	107	12.83 %
News Media.....	10	1.68	4	1.67	14	1.68
Word-of-Mouth.....	63	10.61	55	22.92	118	14.15 ⁽²⁾
Family or Friends in U.S.A.....	89	14.98	50	20.83	139	16.67
Family or Friends in Canada.....	195	32.83	62	25.83	257	30.81
Business Contacts in U.S.A.....	5	0.84	5	2.08	10	1.20
Business Contacts in Canada.....	20	3.37	11	4.58	31	3.72
Other.....	115	19.36	25	10.42	140	16.78
Did Not State.....	17	2.86	1	0.42	18	2.16
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE XII

Respondent's First Trip to Manitoulin Island

Replies	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Yes.....	306	51.52 %	73	30.42 %	379	45.44 %
No.....	279	46.97	158	65.83	437	52.40
Did Not State.....	9	1.51	9	3.75	18	2.16
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE XIII

Reasons For Re-Visit to Manitoulin Island

Reasons	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Personal.....	48	8.08 %	39	16.25 %	87	10.43 %
Winter Carnival.....	—	—	3	1.25	3	0.36
Recreation.....	18	3.03	29	12.08	47	5.63
Pleasure.....	54	9.09	42	17.50	96	11.51
Vacation.....	331	55.72	74	30.83	405	48.56
Hunting.....	11	1.85	3	1.25	14	1.68
Fishing.....	37	6.23	15	6.25	52	6.24
Did Not State.....	95	16.00	35	14.59	130	15.59
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE XIV

Type of Transportation used on this Trip to Manitoulin Island

Type	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Private Car.....	510	85.86 %	205	85.42 %	715	85.73 %
Station Wagon.....	56	9.43	26	10.83	82	9.83
Bus.....	1	0.17	—	—	1	0.12
Train.....	—	—	—	—	—	—
Plane.....	—	—	1	0.42	1	0.12
Other.....	10	1.68	8	3.33	18	2.16
Did Not State.....	17	2.86	—	—	17	2.04
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE XV

Difficulty in Getting to Manitoulin Island

Replies	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Yes.....	35	5.89 %	23	9.58 %	58	6.95 %
No.....	469	78.96	213	88.75	682	81.78
Did Not State.....	90	15.15	4	1.67	94	11.27
TOTAL.....	594	100.00 %	240	100.00 %	834	100.00 %

TABLE XVI

Time away from Home on Visit to Manitoulin Island

Days Away From Home	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Half Day.....	1	0.17%	1	0.42%	2	0.24%
1 Day.....	9	1.52	3	1.25	12	1.44
2—3 Days.....	65	10.94	23	9.58	88	10.55
4—7 Days.....	213	35.86	67	27.92	280	33.57
8—14 Days.....	214	36.03	89	37.08	303	36.33
15—21 Days.....	56	9.43	23	9.58	79	9.47
22—30 Days.....	18	3.03	10	4.17	28	3.36
More than 30 Days.....	11	1.85	24	10.00	35	4.20
Did Not State.....	7	1.17	—	—	7	0.84
TOTAL.....	594	100.00%	240	100.00%	834	100.00%
Average Time Away From Home	9.42 Days		11.93 Days		10.15 Days	

TABLE XVII

Time Spent in Province of Ontario on this Visit to Manitoulin Island

Number of Days	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Half Day.....	1	0.17%	1	0.42%	2	0.24%
1 Day.....	18	3.03	3	1.25	21	2.52
2—3 Days.....	118	19.87	27	11.25	145	17.38
4—7 Days.....	244	41.08	76	31.66	320	38.37
8—14 Days.....	166	27.95	83	34.58	249	29.86
15—21 Days.....	27	4.55	19	7.92	46	5.51
22—30 Days.....	8	1.34	6	2.50	14	1.68
More than 30 days.....	5	0.84	21	8.75	26	3.12
Did Not State.....	7	1.17	4	1.67	11	1.32
TOTAL.....	594	100.00%	240	100.00%	834	100.00%
Average Length of Time Spent in Ontario	7.39 Days		10.94 Days		8.41 Days	

TABLE XVIII

Time Spent on Manitoulin Island

Time Spent	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Less than 3 hours.....	35	5.89%	1	0.42%	36	4.32%
3 hours to one day but not overnight.....	47	7.91	18	7.50	65	7.79
Stayed one night.....	159	26.77	32	13.33	191	22.90
Stayed 2—4 nights.....	143	24.07	65	27.08	208	24.94
Stayed 5—10 nights.....	97	16.33	54	22.50	151	18.11
Stayed more than 10 nights.....	40	6.74	58	24.17	98	11.75
Did not stop—just passed through.....	72	12.12	3	1.25	75	8.99
Did Not State.....	1	0.17	9	3.75	10	1.20
TOTAL.....	594	100.00%	240	100.00%	834	100.00%
Average Length of Stay on Manitoulin Island	3.11 Days		5.91 Days		3.90 Days	

TABLE XIX

**Areas Visited and Facilities Used by Respondent-Parties
on This Trip to Manitoulin Island
Total—Ferry and Road Sample**

Areas and Facilities	Number of Parties	Per Cent	Per Cent Total Facilities
Sainte-Marie Among the Hurons His- torical Site.....	43	57.33 %	
Martyrs' Shrine....	32	42.67	
	75	100.00 %	1.78 %
Georgian Bay Island National Park....	27	3.17 %	
Parks.....	42	4.94	
Hotel Room(s).....	47	5.52	
Motel Room(s).....	303	35.60	
Tourist Home(s)....	130	15.28	
Friend's Home.....	109	12.81	
Trailer Camp.....	48	5.64	
Campsites.....	145	17.04	
	851	100.00 %	20.16
Service Stations....	654	38.88 %	
Brewers' Retail....	147	8.74	
Public Beverage Rooms.....	78	4.64	
Liquor Store.....	227	13.50	
Restaurants or Dining Rooms...	576	34.24	
	1,682	100.00 %	39.84
Boat Rental.....	193	78.14 %	
Golf Course.....	30	12.14	
Movie Theatre.....	24	9.72	
	247	100.00 %	5.85
Hospital.....	24	55.81 %	
Doctor or Dentist...	19	44.19	
	43	100.00 %	1.02
Drug Store.....	205	16.78 %	
Grocery Store.....	484	39.61	
Hardware Store....	178	14.57	
Clothing Store.....	176	14.40	
Other Stores.....	179	14.64	
	1,222	100.00 %	28.94
Other Facilities.....	102		2.41
TOTAL—All Facilities.....	4,222		100.00 %

TABLE XIXA

**Survey on Ferry
Areas Visited and Facilities Used**

Areas and Facilities	Number of Parties	Per Cent	Per Cent Total Facilities
Sainte-Marie Among the Hurons Historical Site.....	8	44.44%	
Martyrs' Shrine....	10	55.56%	
	18	100.00%	0.73%
Georgian Bay Island National Park....	5	0.94%	
Parks.....	9	1.70	
Hotel Room(s).....	22	4.14	
Motel Room(s).....	188	35.40	
Tourist Home(s)....	124	23.35	
Friend's Home.....	67	12.62	
Trailer Camp.....	20	3.77	
Campsites.....	96	18.08	
	531	100.00%	21.55
Service Stations.....	441	41.96%	
Brewers' Retail.....	55	5.23	
Public Beverage Rooms.....	39	3.71	
Liquor Store.....	132	12.56	
Restaurants or Dining Rooms...	384	36.54	
	1,051	100.00%	42.65
Boat Rental.....	125	85.62%	
Golf Course.....	16	10.96	
Movie Theatre.....	5	3.42	
	146	100.00%	5.93
Hospital.....	1	25.00%	
Doctor or Dentist...	3	75.00	
	4	100.00%	0.16
Drug Store.....	87	13.02%	
Grocery Store.....	303	45.36	
Hardware Store....	94	14.07	
Clothing Store.....	82	12.28	
Other Stores.....	102	15.27	
	668	100.00%	27.11
Other Facilities.....	46		1.87
TOTAL—All Facilities.....	2,464		100.00%

TABLE XIXB

**Survey on Road
Areas Visited and Facilities Used**

Areas and Facilities	Number of Parties	Per Cent	Per Cent Total Facilities
Sainte-Marie Among the Hurons Historical Site.....	35	61.40%	
Martyrs' Shrine....	22	38.60	
	57	100.00%	3.24%
Georgian Bay Island National Park....	22	6.87	
Parks.....	33	10.31	
Hotel Room(s).....	25	7.81	
Motel Room(s).....	115	35.94	
Tourist Home(s)....	6	1.88	
Friend's Home.....	42	13.13	
Trailer Camp.....	28	8.75	
Campsites.....	49	15.31	
	320	100.00%	18.20
Service Stations....	213	33.76	
Brewers' Retail.....	92	14.58	
Public Beverage Rooms.....	39	6.18	
Liquor Store.....	95	15.05	
Restaurants or Dining Rooms...	192	30.43	
	631	100.00%	35.89
Boat Rental.....	68	67.33	
Golf Course.....	14	13.86	
Movie Theatre.....	19	18.81	
	101	100.00%	5.75
Hospital.....	23	58.97%	
Doctor or Dentist...	16	41.03	
	39	100.00%	2.22
Drug Store.....	118	21.30%	
Grocery Store.....	181	32.67	
Hardware Store....	84	15.16	
Clothing Store.....	94	16.97	
Other Stores.....	77	13.90	
	554	100.00%	31.51
Other Facilities.....	56		3.19
TOTAL—All Facilities.....	1,758		100.00%

TABLE XX

Respondent-Parties' Rating of Various Facilities in the Manitoulin Region

Total — Ferry and Road Samples

Facilities	EXCELLENT			GOOD			FAIR			POOR			TOTAL		
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent	Per Cent
Hotel/Motel Accommodation	93	28.18 %	183	55.45 %	49	14.85 %	5	1.52 %	330	100.00 %					
Tourist Homes	45	35.16	55	42.97	26	20.31	2	1.56	128	100.00 %					
Quality of Restaurant Food	63	17.26	206	56.44	78	21.37	18	4.93	365	100.00 %					
Quality of Restaurant Service	16	16.00	43	43.00	32	32.00	9	9.00	100	100.00 %					
Quality of Dining Rooms	14	29.79	13	27.66	16	34.04	4	8.51	47	100.00 %					
Service Stations	36	19.46	96	51.89	37	20.00	16	8.65	185	100.00 %					
Entertainment Facilities	3	6.98	—	—	7	16.28	33	76.74	43	100.00 %					
Recreational Facilities	10	40.00	6	24.00	6	24.00	3	12.00	25	100.00 %					
Taverns	—	—	1	16.67	5	83.33	—	—	6	100.00 %					
Cocktail Lounges	3	60.00	2	40.00	—	—	—	—	5	100.00 %					
Attitude of Local People Towards Visitors	84	57.15	50	34.01	10	6.80	3	2.04	147	100.00 %					
Local Prices of Goods and Services	1	0.70	23	16.20	93	65.49	25	17.61	142	100.00 %					
Camping Facilities	18	34.62	20	38.46	9	17.31	5	9.61	52	100.00 %					
Children's Facilities	—	—	3	18.75	6	37.50	7	43.75	16	100.00 %					
Closing Hours	—	—	1	5.56	7	38.89	10	55.55	18	100.00 %					

TABLE XXI

Recreational Activities Undertaken by Respondent-Parties on Visit to Manitoulin Island

Activities	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Picnicking.....	78	9.47%	114	16.76%	192	12.77%
Golfing.....	10	1.21	12	1.76	22	1.46
Attending Movies.....	6	0.73	20	2.94	26	1.73
Fishing.....	228	27.67	144	21.18	372	24.73
Boating.....	178	21.60	134	19.71	312	20.75
Swimming.....	172	20.87	145	21.32	317	21.08
Visiting Other Historical Sites.....	108	13.11	76	11.18	184	12.23
Other.....	44	5.34	35	5.15	79	5.25
TOTAL.....	824	100.00%	680	100.00%	1,504	100.00%

N.B. Total number of Parties is greater than 594, 240, and 834 respectively, because of multiple use.

TABLE XXII

Points of Interest Visited by Respondent-Parties on Trip to Manitoulin Island

Points of Interest	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
Brown Forest Industries Paper Mill.....	1	0.17%	12	5.00%	13	1.56%
St. Paul's Anglican Church—Manitowaning...	14	2.36	25	10.42	39	4.68
Beaver Valley—Espanola.....	8	1.35	22	9.17	30	3.59
The Indian Pow-Wow—Wikwemikong.....	6	1.01	22	9.17	28	3.36
Roosevelt Memorial.....	9	1.51	24	10.00	33	3.96
Sandfield Fish Hatchery.....	31	5.22	7	2.92	38	4.56
Assiginack Museum—Manitowaning.....	8	1.35	3	1.25	11	1.32
Gore Bay Museum—Gore Bay.....	18	3.03	6	2.50	24	2.87
Cup and Saucer Lookout.....	5	0.84	7	2.92	12	1.44
Meldrum Bay Museum & Game Farm.....	12	2.02	3	1.25	15	1.80
Rock Quarry—Willisville.....	—	—	2	0.83	2	0.24
Howland Museum—Little Current.....	19	3.19	2	0.83	21	2.52
Other.....	14	2.36	10	4.16	24	2.87
Did Not State.....	440	75.59	95	39.58	544	65.23
TOTAL.....	594	100.00%	240	100.00%	834	100.00%

TABLE XXIII

Approximate Total Expenditures of Respondent-Parties on Manitoulin Island

Expenditures	SAMPLE ON FERRY		SAMPLE ON ROAD		TOTAL	
	Number of Parties	Per Cent	Number of Parties	Per Cent	Number of Parties	Per Cent
\$ 1— 5.....	—	—	1	0.47 %	1	0.12 %
6— 10.....	—	—	2	0.93	2	0.25
11— 15.....	78	13.13 %	3	1.40	81	10.01
16— 20.....	82	13.80	5	2.32	87	10.75
21— 25.....	36	6.06	5	2.32	41	5.07
26— 30.....	37	6.23	6	2.79	43	5.32
31— 35.....	18	3.03	1	0.47	19	2.35
36— 40.....	21	3.54	7	3.26	28	3.46
41— 45.....	7	1.18	1	0.47	8	0.99
46— 50.....	39	6.57	11	5.11	50	6.18
51— 55.....	—	—	—	—	—	—
56— 60.....	21	3.54	2	0.93	23	2.84
61— 65.....	3	0.50	3	1.40	6	0.74
66— 70.....	8	1.35	3	1.40	11	1.36
71— 75.....	19	3.20	5	2.32	24	2.97
76— 80.....	3	0.50	—	—	3	0.37
81— 85.....	4	0.67	—	—	4	0.49
86— 90.....	2	0.34	—	—	2	0.25
91— 95.....	—	—	2	0.93	2	0.25
96—100.....	34	5.72	14	6.51	48	5.93
101—120.....	8	1.35	3	1.40	11	1.36
121—140.....	10	1.68	2	0.93	12	1.48
141—160.....	39	6.57	16	7.44	55	6.80
161—180.....	3	0.50	3	1.40	6	0.74
181—200.....	30	5.05	28	13.02	58	7.17
Over 200.....	56	9.43	68	31.62	124	15.33
Did Not State.....	36	6.06	24	11.16	60	7.42
TOTAL.....	594	100.00 %	215*	100.00 %	809	100.00 %

Average Expenditure Per Party on Trip..

\$81.06

\$174.27

\$105.83

*Total does not equal 240 because 25 respondents to the expenditure questions indicated that they were permanent summer residents of Manitoulin Island and should not be included as tourists.

TABLE XXIVA

Survey on Ferry

Approximate Expenditures by Categories

Expenditure	FOOD AND BEVERAGE		GIFTS		ACCOMMODATION		ENTERTAINMENT		ATTRACTIONS		PERSONAL USE MERCHANDISE		OTHER	
	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent
\$ 0	257	43.26%	523	88.05%	300	50.51%	579	97.47%	581	97.80%	495	83.33%	418	70.37%
1- 5	63	10.61	21	3.53	17	2.86	4	0.68	8	1.35	22	3.70	50	8.41
6-10	52	8.75	16	2.69	50	8.42	—	—	1	0.17	19	3.20	47	7.91
11-20	69	11.62	18	3.03	66	11.11	4	0.68	4	0.68	18	3.03	35	5.89
21-30	47	7.91	7	1.18	30	5.05	3	0.50	—	—	7	1.18	21	3.53
31-40	25	4.21	3	0.50	28	4.71	—	—	—	—	7	1.18	8	1.35
41-50	23	3.87	2	0.34	24	4.04	—	—	—	—	7	1.18	7	1.18
51-60	7	1.18	—	—	11	1.85	—	—	—	—	1	0.17	2	0.34
61-70	2	0.34	—	—	7	1.18	—	—	—	—	—	—	2	0.34
71-80	15	2.53	—	—	16	2.69	—	—	—	—	3	0.50	—	—
81-90	—	—	—	—	3	0.50	—	—	—	—	1	0.17	—	—
91-100	17	2.86	2	0.34	15	2.53	3	0.50	—	—	6	1.01	2	0.34
Over 100	17	2.86	2	0.34	27	4.55	1	0.17	—	—	8	1.35	2	0.34
TOTAL	594	100.00%	594	100.00%	594	100.00%	594	100.00%	594	100.00%	594	100.00%	594	100.00%

Average Expenditure in Category Party	\$17.52	\$ 2.14	\$21.40	\$ 0.90	\$ 0.15	\$ 5.49	TOTAL
Average Expenditure in Category Party in Per Cent	33.50%	4.09%	40.92%	1.72%	0.29%	10.50%	8.98%/100.00%

TABLE XXIVB

Survey on Road

Approximate Expenditures by Categories

Expenditure	FOOD & BEVERAGE			GIFTS			ACCOMMODATION			ENTERTAINMENT			ATTRactions			PERSONAL USE MERCHANDISE			OTHER		
	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	No. of Parties	Per Cent	
\$ 0.....	56	23.33 %	143	59.58 %	99	41.25 %	185	77.08 %	208	86.66 %	116	48.34 %	132	55.00 %							
1- 5.....	7	2.91	15	6.27	8	3.33	7	2.92	9	3.75	12	5.00	7	2.91							
6-10.....	13	5.42	21	8.75	11	4.58	4	1.67	5	2.08	17	7.08	10	4.17							
11-20.....	27	11.25	17	7.08	22	9.17	12	5.00	8	3.33	32	13.33	25	10.41							
21-30.....	18	7.50	14	5.83	16	6.67	10	4.17	4	1.67	14	5.83	12	5.00							
31-40.....	6	2.50	6	2.50	7	2.92	5	2.08	1	0.42	3	1.25	9	3.75							
41-50.....	24	10.00	11	4.58	14	5.83	8	3.33	2	0.83	12	5.00	12	5.00							
51-60.....	8	3.33	2	0.83	6	2.50	2	0.83	1	0.42	3	1.25	9	3.75							
61-70.....	4	1.67	1	0.42	7	2.92	—	—	—	—	1	0.42	1	0.42							
71-80.....	10	4.17	2	0.83	3	1.25	1	0.42	—	—	8	3.33	3	1.25							
81-90.....	3	1.25	—	—	6	2.50	—	—	—	—	1	0.42	1	0.42							
91-100.....	16	6.67	3	1.25	12	5.00	3	1.25	1	0.42	8	3.33	4	1.67							
Over 100.....	48	20.00	5	2.08	29	12.08	3	1.25	1	0.42	13	5.42	15	6.25							
TOTAL.....	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	240	100.00 %	
Average Expenditure in Category Party	\$55.29		\$11.22		\$39.54		\$7.64		\$2.80		\$21.00		\$19.00		TOTAL		\$156.49				
Average Expenditure in Category Party in Per Cent	35.33 %		7.17 %		25.27 %		4.88 %		1.79 %		13.42 %		12.14 %				100.00 %				

APPENDIX IV

SAMPLING RATIO: _____

NO. _____

Ontario Department of Tourism and Information Manitoulin Island Tourist Survey - 1968

1. When you left home on this trip, how long did you plan to be away?

- | | |
|--|---|
| 1. ½ day <input type="checkbox"/> | 5. 8 days - 2 weeks <input type="checkbox"/> |
| 2. 1 day <input type="checkbox"/> | 6. 15 days - 3 weeks <input type="checkbox"/> |
| 3. 2 - 3 days <input type="checkbox"/> | 7. 23 days - 1 month <input type="checkbox"/> |
| 4. 4 - 7 days <input type="checkbox"/> | 8. More than 1 month <input type="checkbox"/> |

2. How much of this time would be spent in the Province of Ontario?

- | | |
|--|---|
| 1. ½ day <input type="checkbox"/> | 5. 8 days - 2 weeks <input type="checkbox"/> |
| 2. 1 day <input type="checkbox"/> | 6. 15 days - 3 weeks <input type="checkbox"/> |
| 3. 2 - 3 days <input type="checkbox"/> | 7. 23 days - 1 month <input type="checkbox"/> |
| 4. 4 - 7 days <input type="checkbox"/> | 8. More than 1 month <input type="checkbox"/> |

3. On this visit, how many people are there in your party? (PLEASE CHECK ONE BOX (X))

- | | |
|---|---|
| 1. One person <input type="checkbox"/> | 5. Five persons <input type="checkbox"/> |
| 2. Two persons <input type="checkbox"/> | 6. Six persons <input type="checkbox"/> |
| 3. Three persons <input type="checkbox"/> | 7. Seven or more persons <input type="checkbox"/> |
| 4. Four persons <input type="checkbox"/> | |

4. How many of these people are . . . ?
(PLEASE WRITE IN NUMBER OF PERSONS IN EACH CATEGORY)

Number

Adult men (18 years or more)	_____
Adult women (18 years or more)	_____
Teenagers (13 - 17 years old)	_____
Children (12 years old or less)	_____

5. On this trip, how much time have you and your party **actually spent** in this region, and how much time do you **plan to spend** here?

	Have	Plan
	Stayed	To Stay

- | | | |
|---|-------|-------|
| 1. Less than 3 hours | _____ | _____ |
| 2. 3 hours to 1 day - but not overnight | _____ | _____ |
| 3. Stayed 1 night | _____ | _____ |
| 4. Stayed 2 - 4 nights | _____ | _____ |
| 5. Stayed 5 - 10 nights | _____ | _____ |
| 6. Stayed more than 10 nights | _____ | _____ |
| 7. Did not stop - just passed through | _____ | _____ |

6. What was your main reason for your visit here?
(PLEASE CHECK ANSWER IN FIRST COLUMN)

7. What other reasons did you have for visiting here?
(PLEASE CHECK ANSWER IN SECOND COLUMN)

	Main Reason For Visit	Other Reason For Visit
--	--------------------------------	---------------------------------

- | | | |
|----------------------------------|--------------------------|--------------------------|
| 1. Camping | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Picnicking | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Business | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Personal or family affairs | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Just vacationing | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Passing through | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Shopping | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Visiting friends or relatives | <input type="checkbox"/> | <input type="checkbox"/> |

Other reasons (PLEASE WRITE IN) _____

8. Please check the cities and towns that you visited or passed through on this trip; also those you intend to visit while on this trip.

- | | | | |
|---------------------|--------------------------|--------------------------|--------------------------|
| | Stopped
At | Passed
Through | Plan
To Visit |
| 1. Sudbury | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Espanola | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Blind River | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Sault Ste. Marie | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. North Bay | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Orillia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Parry Sound | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Owen Sound | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Tobermory | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Sarnia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Windsor | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Toronto | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Fort William | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Others | _____ | _____ | _____ |
| (PLEASE WRITE IN) | _____ | _____ | _____ |

9. Please check the areas you have visited or plan to visit, and the facilities you have used or will use on this trip.

- | | |
|-----------------------------------|--------------------------|
| 1. Sainte-Marie Among the Hurons | |
| Historical Site | <input type="checkbox"/> |
| Martyrs' Shrine | <input type="checkbox"/> |
| Georgian Bay Island National Park | <input type="checkbox"/> |
| 2. Hotel room(s) | <input type="checkbox"/> |
| Motel room(s) | <input type="checkbox"/> |
| Tourist home(s) | <input type="checkbox"/> |
| Friend's home | <input type="checkbox"/> |
| Trailer Camp | <input type="checkbox"/> |
| Parks | <input type="checkbox"/> |
| Campsites | <input type="checkbox"/> |
| 3. Service stations | <input type="checkbox"/> |
| Brewers' retail stores | <input type="checkbox"/> |
| Public beverage rooms | <input type="checkbox"/> |
| Liquor store | <input type="checkbox"/> |
| Restaurants or dining rooms | <input type="checkbox"/> |
| 4. Boat rental | <input type="checkbox"/> |
| Golf course | <input type="checkbox"/> |
| Movie theatre | <input type="checkbox"/> |
| 5. Hospital | <input type="checkbox"/> |
| Doctor or dentist | <input type="checkbox"/> |
| Drug store | <input type="checkbox"/> |
| 6. Grocery store | <input type="checkbox"/> |
| Hardware store | <input type="checkbox"/> |
| Clothing store | <input type="checkbox"/> |
| Other stores | <input type="checkbox"/> |

(OTHER FACILITIES NOT LISTED,
PLEASE WRITE IN) _____

10. What recreational activities did you or members of your party participate in on this trip to this region?

- | | |
|------------------------------------|--------------------------|
| 1. Picnicking | <input type="checkbox"/> |
| 2. Golfing | <input type="checkbox"/> |
| 3. Movies | <input type="checkbox"/> |
| 4. Fishing | <input type="checkbox"/> |
| 5. Boating | <input type="checkbox"/> |
| 6. Swimming | <input type="checkbox"/> |
| 7. Visiting other historical sites | <input type="checkbox"/> |

Others (PLEASE WRITE IN) _____

11. Please check the category which best expresses your feelings concerning each of the following services in this region.

	Excel- lent 1	Good 2	Fair 3	Poor 4	No Knowl- edge 5
Hotel/motel accom- modation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourist homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of restaurant food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of restaurant service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of dining rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recreational facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tavern	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cocktail lounges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attitude of local people towards visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local prices of goods and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Camping facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Closing hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Was this your first visit to this region of Ontario?

Yes ☐ No ☐

13. Please check each of the following points of interest you have visited on this trip; also those you intend to visit.

	Have Visited	Plan To Visit
1. Brown Forest Industries Paper Mill	<input type="checkbox"/>	<input type="checkbox"/>
2. St. Paul's Anglican Church— Manitowaning	<input type="checkbox"/>	<input type="checkbox"/>
3. Beaver Valley—Espanola	<input type="checkbox"/>	<input type="checkbox"/>
4. The Indian Pow-Wow— Wiwemikong	<input type="checkbox"/>	<input type="checkbox"/>
5. Roosevelt Memorial	<input type="checkbox"/>	<input type="checkbox"/>
6. Sandfield Fish Hatchery	<input type="checkbox"/>	<input type="checkbox"/>
7. Assiginack Museum— Manitowaning	<input type="checkbox"/>	<input type="checkbox"/>
8. Gore Bay Museum—Gore Bay	<input type="checkbox"/>	<input type="checkbox"/>
9. Cup & Saucer Lookout	<input type="checkbox"/>	<input type="checkbox"/>
10. Meldrum Bay Museum & Game Farm	<input type="checkbox"/>	<input type="checkbox"/>
11. Rock Quarry—Willisville	<input type="checkbox"/>	<input type="checkbox"/>
12. Howland-Little Current	<input type="checkbox"/>	<input type="checkbox"/>

Other (PLEASE WRITE IN) _____

14. How was Manitoulin Island first brought to your attention?

- | | |
|--------------------------------|--------------------------|
| 1. Advertisements or brochures | <input type="checkbox"/> |
| 2. News media | <input type="checkbox"/> |
| 3. Word-of-mouth | <input type="checkbox"/> |
| 4. Family or friends in U.S. | <input type="checkbox"/> |
| 5. Family or friends in Canada | <input type="checkbox"/> |
| 6. Business contacts in U.S. | <input type="checkbox"/> |
| 7. Business contacts in Canada | <input type="checkbox"/> |

Others (PLEASE WRITE IN) _____

15. Do you plan to visit this region again for any of the following reasons?

- | | | | |
|--------------------|--------------------------|-------------|--------------------------|
| 1. Personal | <input type="checkbox"/> | 5. Vacation | <input type="checkbox"/> |
| 2. Winter Carnival | <input type="checkbox"/> | 6. Hunting | <input type="checkbox"/> |
| 3. Recreation | <input type="checkbox"/> | 7. Fishing | <input type="checkbox"/> |
| 4. Pleasure | <input type="checkbox"/> | | |

16. What was the approximate total expenditure of your party on this trip to this region of Ontario?

17. Would you please indicate the approximate expenditure on this trip for EACH of the following categories?

- | | |
|-----------------------------|-------|
| 1. Food and beverages | _____ |
| 2. Gifts | _____ |
| 3. Accommodations | _____ |
| 4. Entertainment | _____ |
| 5. Attractions | _____ |
| 6. Personal use merchandise | _____ |
| 7. Other | _____ |

18. What type of transportation have you used on this trip?

- | | | | |
|--------------------------|--------------------------|----------|--------------------------|
| 1. Private passenger car | <input type="checkbox"/> | 4. Train | <input type="checkbox"/> |
| 2. Bus | <input type="checkbox"/> | 5. Plane | <input type="checkbox"/> |
| 3. Station wagon | <input type="checkbox"/> | 6. Other | _____ |

(PLEASE WRITE IN) _____

19. If you were towing a trailer, what type was it?

- | | | | |
|--------------------|--------------------------|----------------|--------------------------|
| 1. Camping trailer | <input type="checkbox"/> | 3. Mobile home | <input type="checkbox"/> |
| 2. Boat trailer | <input type="checkbox"/> | 4. Other | _____ |

(PLEASE WRITE IN) _____

20. Into which of the following age groups do you belong?

- | | |
|--------------------------------|--------------------------|
| 1. Under 20 years old | <input type="checkbox"/> |
| 2. Between 20 and 34 years old | <input type="checkbox"/> |
| 3. Between 35 and 49 years old | <input type="checkbox"/> |
| 4. 50 years and over | <input type="checkbox"/> |

21. To guide us in placing advertisements and in our public relations, what is your occupation?

Type of work: _____

Type of Company _____

22. In what town or city do you reside?

Town or city: _____

Province or state: _____

23. Did you find it difficult to get to this region of Ontario?

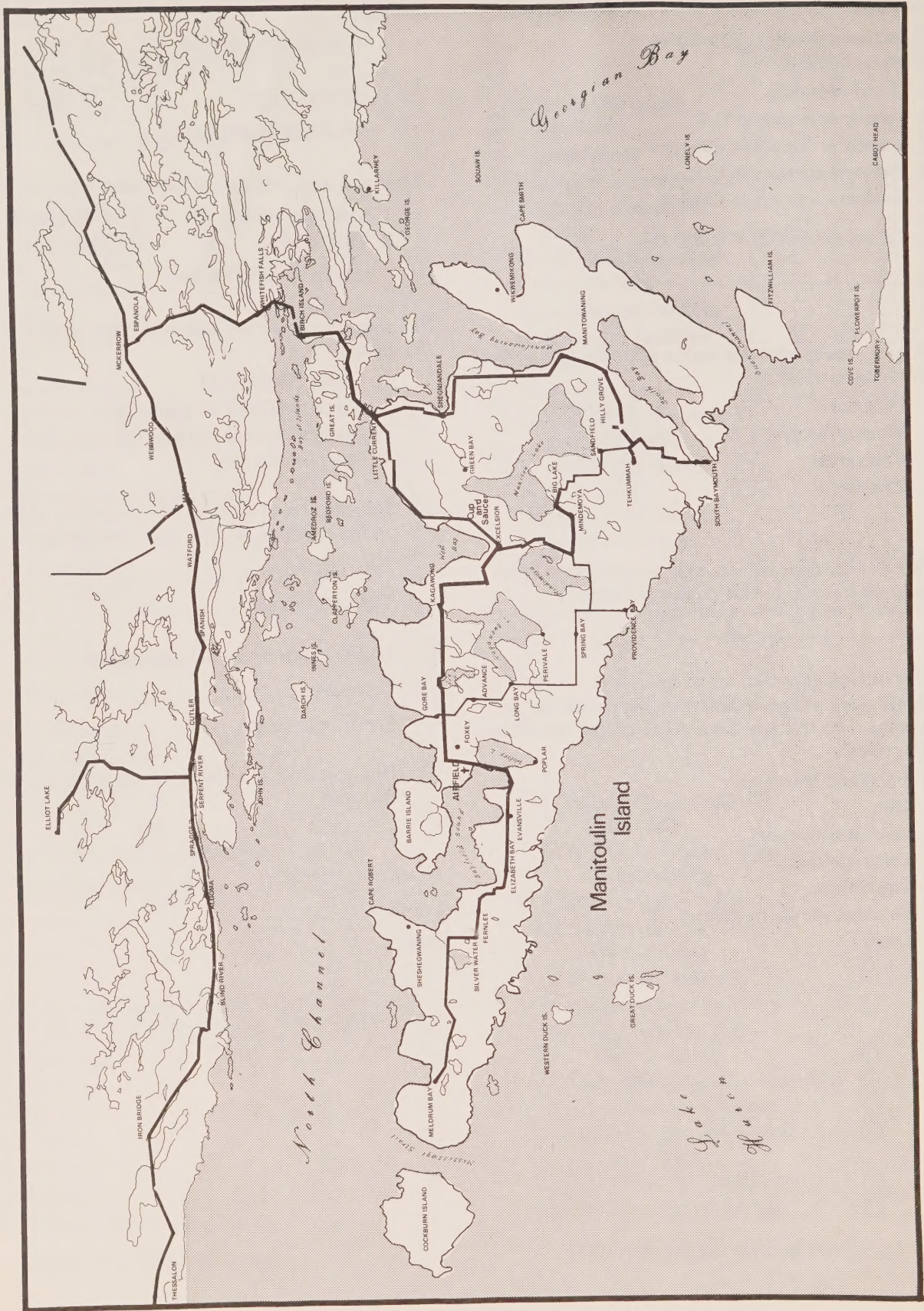
Yes ☐ No ☐

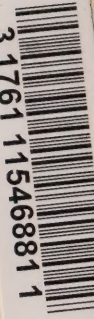
Name of Interviewer: _____

Location: _____

Date: _____

APPENDIX V





3 1761 11546881 1